Call Entry Dispatch System

User Manual

Version 6

COINS®

COnstruction INdustry Software

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S H A K E R

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COINS® - COnstruction INdustry Software

Call Entry Dispatch System User Manual

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Introduction

What Does the Call Entry/Dispatch Board Do?

SHAKER designed the Service Management **Call Entry/Dispatch Board** to centralize all your dispatch and call management needs.

With its GUI (Graphical User Interface) design technology and one main Dispatch Board, you can assign and dispatch technicians, enter and update calls, review technician schedules, and more, all with the click of a mouse button.

The Call Entry/Dispatch Board works hand-in-hand with the character-based COINS Service Management module. Since they share the same databases, indexes and tables, no additional tailoring, file maintenance or start-up data entry is required. Just install the Call Entry/Dispatch Board and it will retrieve the necessary information from your COINS Service Management module.

How to use this manual

This publication describes Call Entry/Dispatch Board and explains how it can be used effectively.

Note

This manual applies to both Version 6 and Version 7 of COINS. Notes in the text will discuss any situations or information that is different between the versions.

Organization of the manual

This manual contains detailed information on the installation and use of the Call Entry/Dispatch Board. You should review the sections of this manual relevant to your use of the Call Entry/Dispatch Board. For example, if your primary responsibility is dispatching technicians, read the section dealing with that function.

Note

All users should read Chapter 3, which offers a self-guided tour of the Call Entry/Dispatch Board. It takes you through basic call entry and dispatch procedures, step by step.

This manual is divided into the following chapters, as described below. Once you are familiar with the system, use the detailed index and table of contents to "zero in" on the specific topics as you need more information.

This manual presents information in nine chapters.

Introduction

Call Entry/Dispatch module description. Manual conventions and description.

1. System Installation

Provides installation instructions to successfully install your Call Entry/Dispatch Board.

2. Getting Started

Overview of the Call Entry/Dispatch Board, including the Dispatch Board and key dispatch functions.

3. The Self Guided Tour

A step-by-step overview of using the Call

Entry/Dispatch Board. This chapter covers key functions with minimal detail.

4. **Display Options**

   Information about browser display options.

5. **Entering Calls**

   Detailed information about entering, updating and closing service calls.

6. **Assigning, Dispatching and Ending Call Assignments**

   Detailed information about assigning, dispatching and completing service calls.

7. **Technician Actions**

   Sending technician messages and monitoring their daily, monthly and combined schedules.

8. **Reports and Inquiries**

   How to get information from the Call Entry/Dispatch Board. Includes descriptions and samples of Inquiries and reports.

Appendices and an index for the entire manual are also included.

Printing conventions and special symbols

The Call Entry/Dispatch Board contains numerous windows and functions. To help facilitate your understanding of both this manual and the system itself, the following standards are used throughout the manual.

When we talk about a view or window, its name is in italics.

Example:
The main Dispatch Board contains a *Call Browser* and a *Technician Browser*.

Actions that can be performed by the user are in bold print.

Example:
Simply click on the **Assign action button** to assign the selected call.

Keys to be pressed are in square brackets.

Example:
Press [Alt][A] to assign a call.

(i.e., press the key labeled Alt and the underlined letter on an action button to perform that action)

Often, there are multiple ways to perform a specific action in Call Entry Dispatch. The following symbols indicate are visual clues to such instructions.

Represents using the drop-down menus at the top of the screen.

Represents using an [Alt][key] combination. (The second key is indicated by the underlined letter).

Represents a mouse action, such as clicking on a button or right-clicking to call up a menu box.

Step-by-step instructions are annotated to indicate whether a step is required or optional. For example:

☑ means this step is required

☐ means this step is optional

System Installation

What this chapter covers…

This chapter provides the information you need to successfully install the Call Entry/Dispatch Board on your system.

SHAKER recommends that the System Administrator perform the initial installation of the **Call Entry/Dispatch Board**, or other personnel trained in both UNIX and PC installation processes.

Setting up the CE/Dispatch Board is a five-step process. The first two steps involve preparing the UNIX host (the server) to run the CE/Dispatch Board. The other three occur at each individual PC.

Figure 1: The 5 Steps of CE/Dispatch Board Installation

1. Install COINS Update
2. Set UNIX Parameters
3. Install Progress on PC
4. Install Call Entry/Dispatch on PC
5. Set and Save Database Connections

Exit all other applications running on the PC before beginning the installation process.

Every effort was made to ensure the accuracy of the installation information presented here. In the event that you have a problem or concern with your installation, please contact SHAKER Client Support.

Note about Network Performance

The network bandwidth and the volume of traffic over the network directly affect network performance. Client-server products such as the CE/Dispatch Board involve more intensive data transfer than character-based COINS software. Under certain conditions, SHAKER may recommend an alternate installation.

Before installing the Call Entry Dispatch System

Before installing the CE/Dispatch Board on a PC:

- Verify that the PC meets the minimum requirements listed below.
- Test the TCP/IP connection of the PC.

1. Verify PC Requirements

Each PC must conform to the minimum specifications listed below in order to perform satisfactorily. These recommendations apply to PCs with the standard installation of the CE/Dispatch Board.

- 166 MHz processor or faster
- 32 MB RAM
- 400 MB of disk space available
- PROGRESS Client Networking Version 8.3
- Windows 95 or 98
- 20” VGA monitor, 1024 x 768 resolution
- CD-ROM drive
- Modem (for support), 28,800 baud or faster
- PcANYWHERE by Symantec (for support)

2. Test PC Connection

The PC on which you install the CE/Dispatch Board must be able to connect to COINS via TCP/IP.

Prior to installing the CE/Dispatch Board, test the TCP/IP connection of each PC by successfully connecting to COINS on the UNIX host.

Correct any connection problems before installing the CE/Dispatch Board.

1. Install COINS update on the server

If you received COINS update media (e.g., a tape or diskette) in addition to the CE/Dispatch Board CD, install the update first.

Follow the installation instructions that accompany the update media. Contact SHAKER Technical Services if you need additional assistance with loading the COINS update.

2. Set UNIX parameters

The UNIX server needs to be prepared before the CE/Dispatch Board is installed on the individual PCs. This only needs to be done once for each installation, since all PCs using the CE/Dispatch Board connect to the same UNIX host.

The UNIX setup consists of the following steps, which are normally performed by the SHAKER Technical Services Unit when the CE/Dispatch Board is first installed at a client site. The client's System Administrator may also conduct them, or other personnel trained in both UNIX and PC installation processes.

a. Exit the database and shut the server

b. Connect to UNIX as the root user

c. Edit the `/etc/services` file

d. Edit the server parameter files (Version 6 only)

e. Edit the `costart` file (Version 6 only)

f. Sign into the COINS database

See Appendix B for detailed information about these settings.

Note

All tasks on the UNIX host must be performed by the **root** user account.

3. Install PROGRESS on the PC

You need to install PROGRESS version 8.3 on any PC that will run the CE/Dispatch Board.

Follow the installation instructions as stated in the PROGRESS Installation Guide, being sure to include the following installation information.

1. On the *Type and Destination* screen:
   - Choose **Quick Install**.
   - In the Path Name, type **DLC83**.
2. On the *Group and Item Properties* screen:
   - Change PROGRESS to **PROGRESS83**.
   - Complete the Item Working Directory as follows:
     Drive is **C:**
     Path is **SHAKER**
     Answer **Yes** when it asks if you want to create that directory.
3. Complete the PROGRESS installation.
4. Restart the PC.

4. Install the Call Entry Dispatch System on the PC

First, make sure you have installed PROGRESS on the PC that will be using the CE/Dispatch Board. Then load the CE/Dispatch Board. CE/Dispatch will not function properly if the installation is done out of order.

Note

If an earlier version of Call Entry/Dispatch is already loaded on this PC, remove it before installing the updated version. [1]

To load the CE/Dispatch Board from the CD:

1. Insert the Software Installation CD in the PC's CD drive.
2. Click the Windows **Start** button, then **Run**.
3. From Run, click the **Browse** button.
4. Find the icon for your CD-ROM drive and double-click on it to open it.
5. Software Installation CD may contain several software installation files. Look for the install file for your version of the Call Entry/Dispatch Board and double-click on it. For example:
   Gd6.exe Version 6 Call Entry/Dispatch
   Gd7.exe Version 7 Call Entry/Dispatch
6. You will return to the Run screen; click the **OK** button.
7. The installation program asks if you want to install this software now. Click **Yes**.
8. The installation program requests the password required to extract the files. Enter the license key provided in the installation instructions that accompanied the CD.

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[1] To remove the earlier version of Call Entry/Dispatch, use **Add/Remove Programs** option in the Windows Control Panel

1. Click on the **Start** button, then **Settings**, then **Control Panel**.
2. Select **Add/Remove Programs**.
3. Choose **S/M Call Entry/Dispatch**, then click the **Remove** button.

9. Answer the questions on the popup dialog boxes as they appear. In particular, note that the CE/Dispatch Board must be installed in **C:/shaker/dispatch** in order to run correctly.

10. Close the message window that says that installation is complete. The Dispatch Icon now appears on the PC desktop.

The installation places the CE/Dispatch icon on the PC desktop and also adds the GUI Dispatch option to Windows **Start Menu.**

Setting the Call Entry/Dispatch Board to start automatically

If you want to Call Entry/Dispatch to automatically start when you turn on this PC, you must add it to the Windows Startup folder. The following instructions apply to both Windows 95 and Windows 98.

1. Click on the Windows **Start** button, choose **Settings**, and then **Taskbar.**

2. Click the **Start Menu Properties** tab. Then click on the **Advanced** button in the **Customize Start Menu** portion of the screen. (See Figure 2: Accessing Task Bar from Start Menu.)

3. From the folder list that now appears, double click on **Programs**. Then, double click on the **StartUp** folder. This folder contains all the programs that begin running when Windows 95 starts.

4. Drag or copy the Dispatch shortcut icon from the desktop into the **StartUp** folder, as shown in Figure 3: Adding Dispatch to the Startup Menu.

Figure 2: Accessing Task Bar from Start Menu

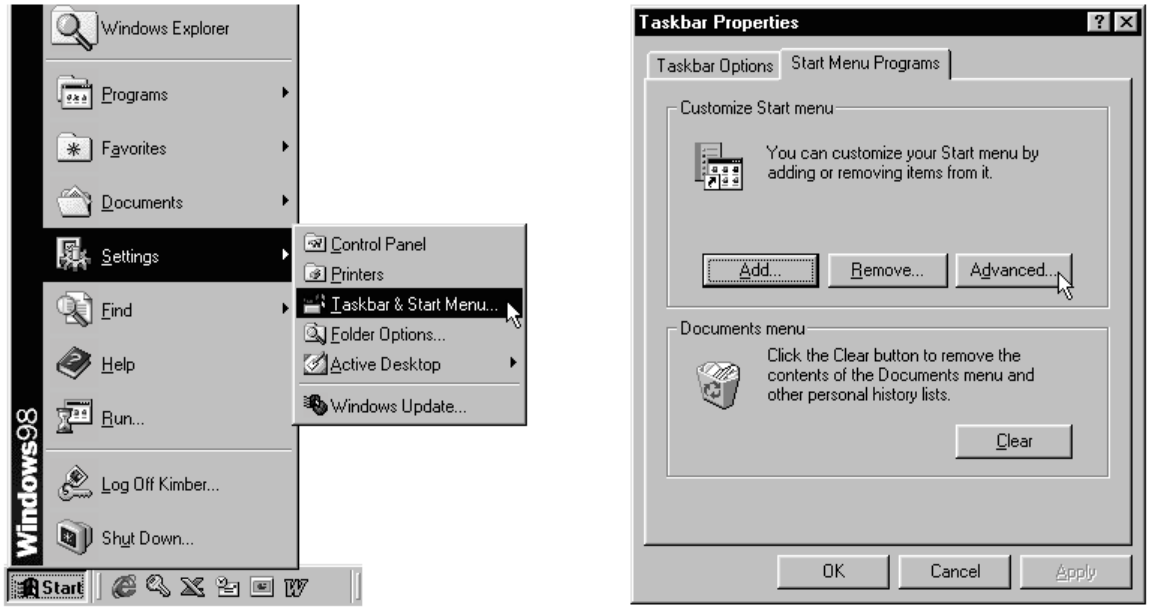
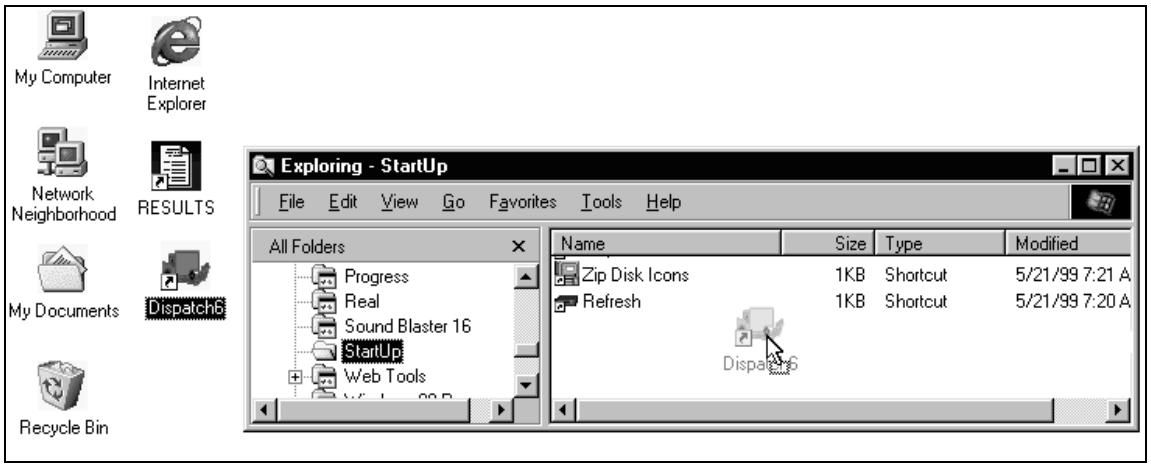


Figure 3: Adding Dispatch to the Startup Menu



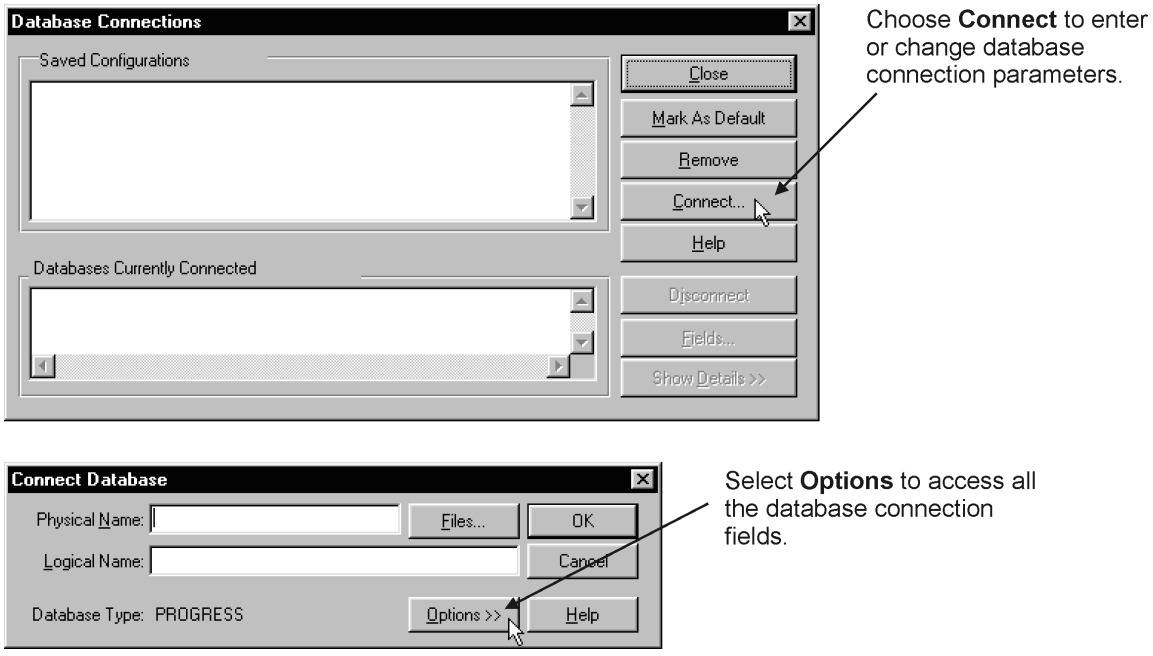
5. Set and save database connections

Once Call Entry/Dispatch has been installed, you can perform the final steps needed to connect it to your Accounting database(s). The first time you use Call Entry/Dispatch, you should set up and save the database connections to the Accounting databases with which it will be used.

Double-click the desktop Call Entry/Dispatch icon. This opens the Database Connections window, which is blank during initial setup. You will need to set up the following connections:

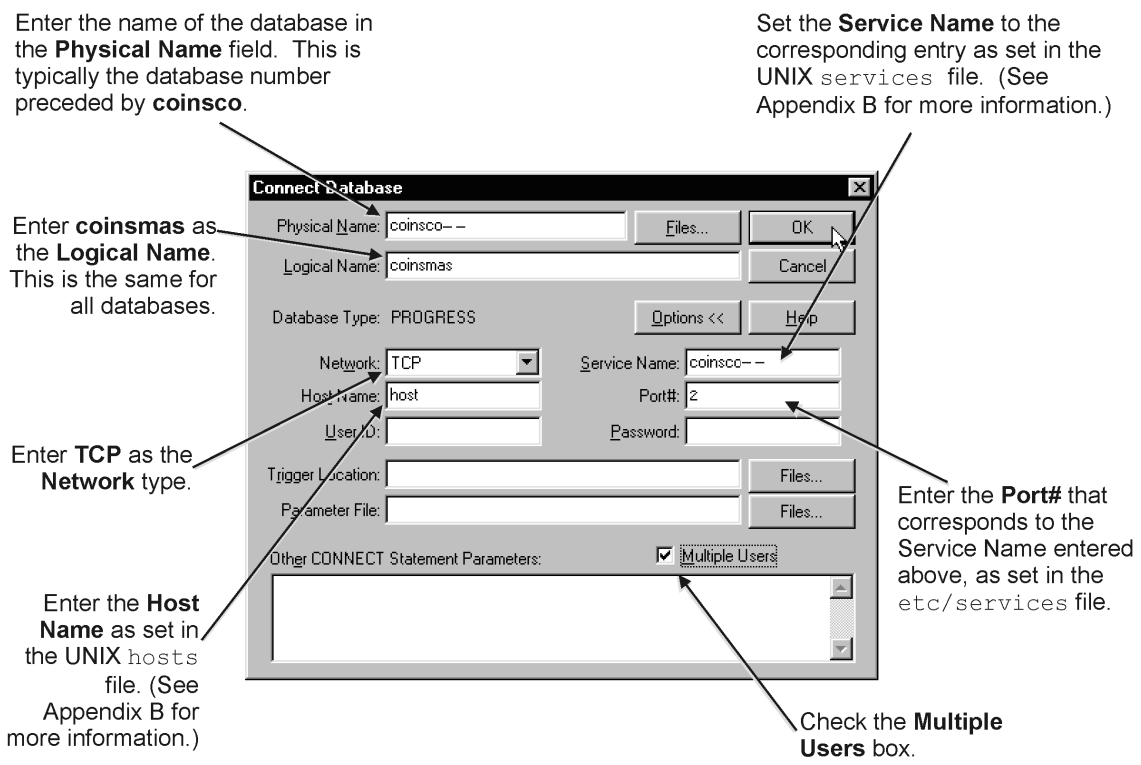
Accounting Database	You can set up connections for any COINS database that has been established on your UNIX server.
System Administration Database	**Version 7 only**. This database contains user information, security, and other information shared between Accounting databases.

Figure 4: Database Connections



The entries on this screen are for illustration only; actual values vary from system to system.

Figure 5: Database Connections – Detailed Options


Enter the name of the database in the **Physical Name** field. This is typically the database number preceded by **coinsco**.
Set the **Service Name** to the corresponding entry as set in the UNIX `services` file. (See Appendix B for more information.)
Connect Database
Physical Name: coinsco--
Files...
OK
Logical Name: coinsmas
Cancel
Database Type: PROGRESS
Options <<
Help
Network: TCP
Service Name: coinsco--
Host Name: host
Port#: 2
User ID:
Password:
Trigger Location:
Files...
Parameter File:
Files...
Other CONNECT Statement Parameters:
Multiple Users
Enter **coinsmas** as the **Logical Name**. This is the same for all databases.
Enter **TCP** as the **Network** type.
Enter the **Host Name** as set in the UNIX `hosts` file. (See Appendix B for more information.)
Enter the **Port#** that corresponds to the Service Name entered above, as set in the `etc/services` file.
Check the **Multiple Users** box.

The entries on this screen are for illustration only; actual values vary from system to system.

The **Connect Databases** window tells Call Entry/Dispatch how to connect to your databases. The standard installation of Call Entry/Dispatch requires that you enter information for the following fields. **LEAVE ALL OTHER FIELDS BLANK**!

See the next page[2] for additional information. Complete documentation for these fields can be found in your PROGRESS *Networks Guide.*

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[2] If you are unable to connect to the database using the information entered here, you may need to manually update the **`services`** or **`hosts`** files in the PC's Windows folder. The **`services`** file on the PC needs the same entries as those in the UNIX **`services`** file. The Windows **`hosts`** file, if used, needs a line that maps the UNIX host name to the IP address of the host machine, for example:

```
127.0.0.1      localhost     # description
```

Field Definitions

Physical Name — Represents the actual name of the database on a disk.

Logical Name — A logical name is given to a database to gain more programming flexibility. COINS uses the following logical names.

For Version 6:

Logical Name	Applies to
coinsmas	All accounting databases

For Version 7:

Logical Name	Applies to
acctmas	All accounting databases
admmas	System Administration database

Network — This must be **TCP**.

Host Name — The name of the computer where the database resides.

Service Name — The entry from the **`services`** file that corresponds to the specified database.

Port # — Enter the port number for this service as it was entered in the UNIX **`services`** file. The system creates the corresponding **`services`** entry on the PC.

Multiple Users — Check this box for all databases.

Leave the remaining fields blank. Click **OK** when you have finished entering the connection information for the database.

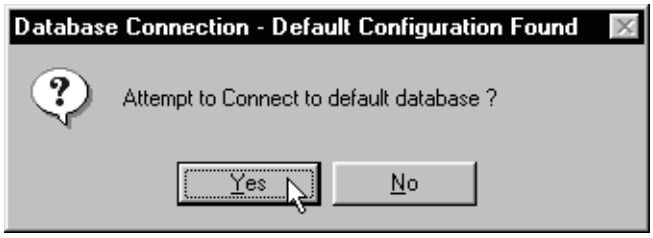
If your connection was successful, the system will ask if you want to save the configuration. Click **Yes**. After the configuration has been saved, you only need to go into Options to change or add configuration.

Set default database connection

SHAKER recommends that you mark the database connection to the COINS database used most often as the default connection, using the **Mark as Default** button on the Database Connections Window.

If you make this database the default connection, the next time you start the Call Entry/Dispatch Board, you will have the option to **Attempt to Connect to default database**, as shown below.

Figure 6: Connect to Default Database



Troubleshooting

Here are some common errors you may encounter during installation and ways to correct them.

Problem: No server

Make sure the server is running on the host.

You can verify this by having a session with the company in question running. In other words, make sure that a session is running in the character based version of COINS for that company. To do this, log into the character-based COINS database for that company.

Make sure the Host Services side was set up correctly

1. Go to the directory where the database resides
   Example : `cd $DATA`

Look to see if the server is running by doing a UNIX list(ls) by entering `ls <databasename>.lk`
Example : `ls coinsco99.lk`

If a <databasename>.lk file exists, it is likely that the server is running. Have all the users exit the database and restart it. To start the server back up, you can simply use the regular COINS menu and select the company.

2. When you are sure the server is started again, attempt to connect to the database using the client server parameters

   `mpro -db <databasename> -S <servicename> -N TCP -H <hostname>`

   Example: `> mpro -db coinsco99 -S coinsco99 -N TCP -H rs250`

   If the command does not pagepagework, then there may be a problem with the `services` file on the host computer. Review Appendix B, Setting UNIX Parameters.

3. Then look at the log file <databasename>.lg, using the `tail` command
   Example: `tail coinsco99.lg`

   Look for the string “usernum”. You should find a entry similar to:

   ```
   08:32:51 SRV  2: Logout usernum 25, userid , on tim. (739)
   ```

   If the string does not look right, then there may be a problem with the `services` file on the host computer or on the PC. Review Appendix B, Setting UNIX Parameters.

Problem: Cropped screen

Check the desktop properties **Settings**. You should have it set up with **Small Font**, a **Desktop Area** of 1024 x 768 and a **Colors** setting of 256.

In Summary

This chapter provided the information and instructions needed to install the Call Entry/Dispatch System. If you are unable to successfully install your system after following the above procedures, please contact SHAKER Client Support for further assistance.

Getting Started

What this chapter covers…

This chapter provides an overview of the *Dispatch Board* to help you better understand its functions and terminology.

The *Dispatch Board* is the primary location where all the dispatcher's navigation or actions begin. It is the first screen (or window) you see after you log into the system. It provides access to all other windows and functions in the Call Entry Dispatch System through a variety of menus and action buttons.

Using Windows

Whether you are very familiar with using Microsoft Windows or have little experience, you should have little difficulty learning to use the Call Entry Dispatch System. The next few pages describe some basic Windows system conventions that will help you navigate through the system.

Using a mouse

A mouse works by placing the mouse pointer (usually an arrow) somewhere on your screen, and then clicking with the mouse button to perform an action.

Unless otherwise specified, use the left (primary) mouse button when clicking.

There are several different types of clicks. The main types are briefly described below, but the best way to learn how to use a mouse is to actually use the system.

Single Click
Some actions are performed by clicking the mouse button once. For example, click once on an action button to perform that action.

Double Click
This means to click the mouse button two times in immediate succession, relatively quickly. For example, double click on a call to select it and open it for updating.

Right Click
Press the right (i.e., non-primary) mouse button to open up a popup menu of appropriate actions, based on the position of the cursor. For example, if the cursor is placed over a call, the popup menu lists options such as Assign, Dispatch, Complete, and Print Call.

Navigating using the Task Bar

The Windows Task Bar is located at the bottom of the screen, below the Dispatch Board (where the Windows Start button is located). Whenever you start a program or open a window, a button representing that window appears on the Task Bar. When you close a window or exit a program, its button disappears from the Task Bar. If you wish to view one of the open windows, simply click on its Task Bar button.

Windows Task Bar

By default, the Task Bar is always visible when Windows is running. If the Task Bar obstructs part of the Dispatch Board, you can reduce its size or use other controls included in Windows to hide it.

Moving between windows

The Call Entry Dispatch Board requires 1024x768 pixels. This means that on most monitors, the Dispatch Board uses up all the available screen space.

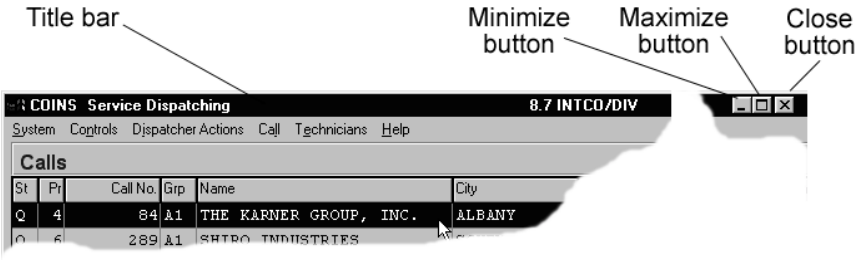
If you have applications running in other windows, there are two quick ways to move between the windows.

- Use the Task Bar as described above.
- Hold down the **[Alt]** key and press the **[Tab]** key - Alt Tab. This brings up a box showing icons for all the open windows. Press the **[Tab]** key until the window you want to use is highlighted. When you release the **[Alt]** key, that window comes "into focus" or to the top.

Moving or resizing a window

PC windows can be minimized, maximized, closed and moved.

Windows Controls

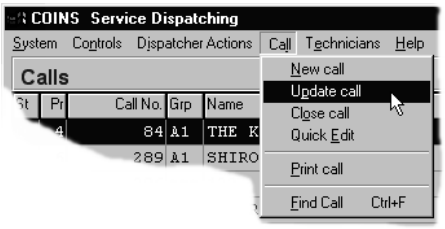


- You can move a window around the screen. Using your mouse, click and hold on the solid blue title bar at the top of the window. Without releasing the mouse button, move the mouse on the mousepad. When you move the mouse pointer, you move the window.
- Every window has a Close button in its upper-right corner. When you click on this button, you close the window and quit the program.
- Next to the Close button are the Minimize and Maximize buttons. You may use these buttons to resize your window. When you minimize the Dispatch Board, a button representing it appears on the Task Bar. Click on the Task Bar button to recall the Dispatch Board.

Using the Menu Bar

A menu bar is located along the top of the Dispatch Board. When you click on a selection on the Menu Bar, you see a drop down menu. You can choose something from this menu by moving your mouse pointer to your choice and clicking.

Menu Bar



Using the Scroll Bars

When a window is not large enough to display all the information it contains, a scroll bar appears on the side or bottom of the window. You can scroll through the information by dragging the scroll box or clicking on the scroll arrows.

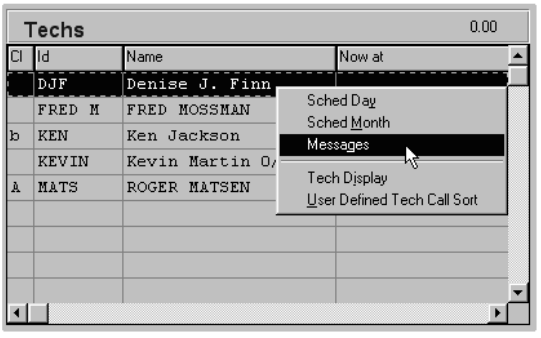
Scroll Bars

Using Pop-up Menus

In certain Call Entry Dispatch browsers and windows, a single *right mouse click* displays a pop-up menu of actions and navigational commands appropriate to the current browser or window. This gives the user the ability to select or review an item and, with minimal mouse movement, click and choose an action or a navigation option.

For example, a single right mouse click over the Call Browser brings up the menu shown below.

Pop-up Menu



Starting Call Entry Dispatch

There are several ways to start up the Call Entry Dispatch Board when you want to use it. (The first two are set up automatically when you install Call Entry Dispatch, as described in Chapter 1.)

1. Double click (using the left mouse button) on the Dispatch shortcut icon created on the Desktop when Call Entry Dispatch was installed on your PC.

2. Click the Windows **Start** button and select the **Dispatch** option. (Look for an option labeled *Version 6 Dispatch* or *Version 7 Dispatch*, depending on the version you installed.)

3. Click the Windows **Start** button, go to **Programs**, and select **GUI Dispatch** from the Programs list.

4. Add Call Entry Dispatch to the **Windows Startup** menu, so that it automatically starts up when you start your computer. To do this, click on the **Start** Button. Select **Settings→Taskbar & Start Menu**. Go to the **Start Menu Programs** tab and click on the **Advanced...** button. Copy the Dispatch shortcut, then paste it into the Startup folder.

Connecting to a Database

The next thing you need to do is connect to the Service Management system. (This is the database that contains the S/M data you want to use. See Chapter 1 for detailed instructions on setting up the database connections.)

If you followed the recommendation to set up a default connection (see page xxx in Chapter 1), the system asks: "Attempt to connect to default database?" Click **Yes** to connect to the database. If you click **No**, the full Database Connection screen appears, so that you may select the database to use.

If you did not set up a default connection, the full Database Connection screen appears.

Logging On

After you have connected to the appropriate database and started Call Entry Dispatch, you need to log in. If you are a new dispatcher, you need to get a User ID and password from your company's System Administrator and this User ID needs to be added to the S/M Dispatcher File.

The logon process identifies you to the system and controls which information you can enter, view or update.

Logon Screen

Enter your User ID at the prompt. If prompted, you must also enter a Password. Then either click the **OK** button or press the **[Enter]** key on your keyboard.

This logon process is necessary because the Call Entry Dispatch Board is designed to work hand-in-hand with the character-based Service Management module. There is no need to do any additional system tailoring, file maintenance or start-up data entry. Many settings in Call Entry Dispatch default from S/M tailoring or the Dispatcher File.

Opening the Dispatch Board

After you enter the correct User ID and password, the Application Manager starts up. Depending on how your system is set up, you may need to click the "Dispatch and Call Entry" button. This will bring you to the main window of Call Entry Dispatch, the *Dispatch Board*.

Application Manager

You may also set the Dispatch Board to start automatically, in effect skipping this step. To do this:

1. From the Application Manager menu bar, select **System→Options**. This opens up the Launch Pad Options window.

2. Click the box next to **Automatically Launch a Program after Login** to place a checkmark in it.

3. Click the button labeled **Program Name*** to see a listing of currently Launch Pad buttons.

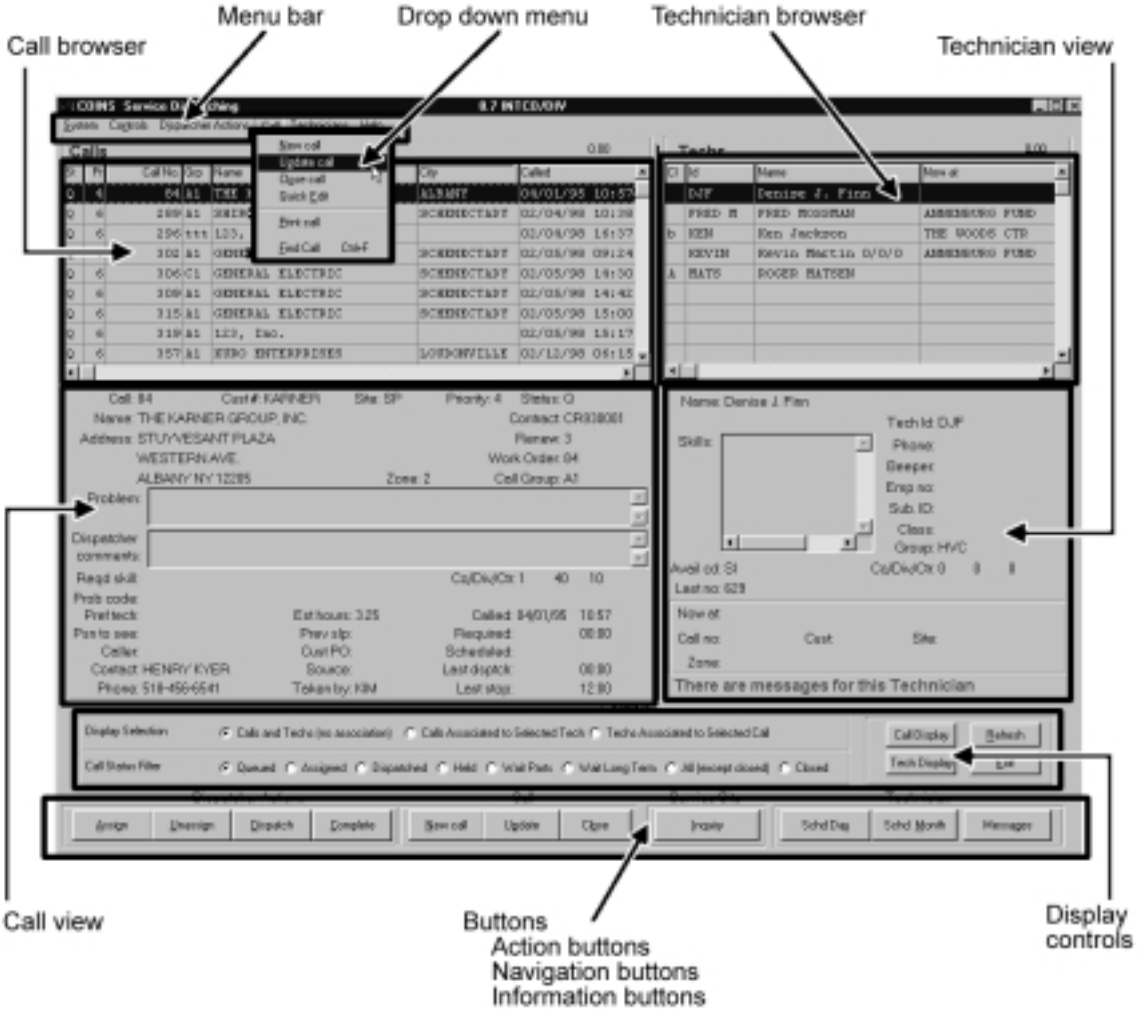
4. Select **GUI Dispatch** (program name dispmain.p) and click OK. Click OK again to close the Launch Pad Options window.

The next time you sign into to Call Entry Dispatch, the Application Manager will display briefly while the Dispatch Board automatically start.

Introducing the *Dispatch Board*

The Dispatch Board is the primary location for dispatch actions and it is where any other functions or navigation begin. It is the first window you will see and it provides access to all other windows and functions in the Call Entry Dispatch System.

Dispatch Board, Version 7



Note: The Co/Div/Ctr fields shown in the Call View and Technician View appear only in Version 7.

Using browsers, views and buttons

Some common words and phrases used throughout this manual have a special meaning for the Call Entry Dispatch Board. In most cases, the meanings are intuitive but some functional definitions appear here to ensure that all users understand them in the context of this manual.

A *Browser* allows you to see an available set of data. For example, a display of service management calls.

Display controls allow you to change the selection criteria on the browser. For example, the calls can be displayed based on call status (queued, assigned, dispatched, etc.)

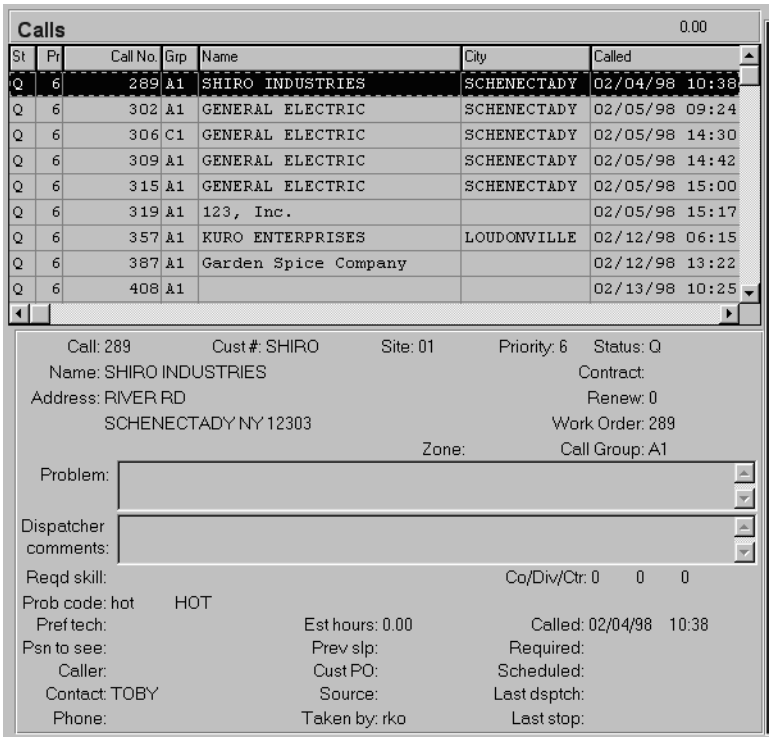
A *View* offers you detailed information about a chosen item. For example, complete call information about the call selected on the browser.

Buttons allow you to access additional dispatch system functions. An action button will perform the requested task on the call or technician selected in the Browser. For example, the call update button will bring up a window where you can modify data on the call selected on the browser.

Viewing call slip information

Call Slip information is displayed on the Dispatch Board in the *Call Browser* and the *Call View*.

Call Browser and Call View

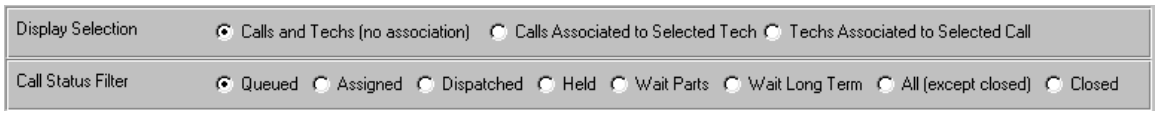


The *Call Browser* displays basic information about a set of calls. You can "browse" through the list and select a call for assignment, modification, etc.

When a call is highlighted on the browser, detailed information about the call appears in the *Call View* (located directly below it on the *Dispatch Board*). In addition to the abbreviated information available on the browser, the *Call View* gives fundamental call information like address and contact person and specific information about the problem - priority, status, etc.

The calls display in the browser based on your display preference. Using the *Display Controls* located below the *Call View*, you can limit or expand the *Call Browser* display by display selection and call status. The controls used for the sample screen are set as shown.

Display and Call Status selections



- It displays calls and technicians without considering whether they are associated with each other.
- It displays only queued calls, i.e., calls waiting assignment or other disposition.

See Chapter 4 for a complete discussion of *Display Control* functionality.

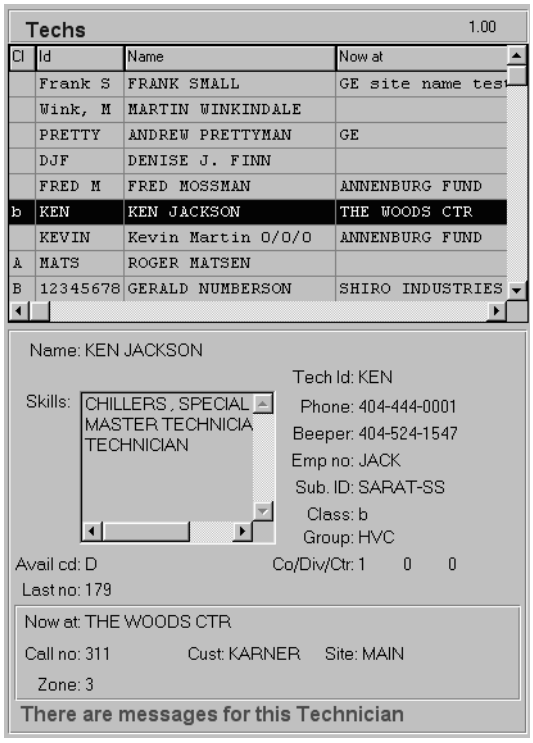
Identifying high priority calls

To help you quickly identify calls with certain attributes, the browser on the main dispatch screen will apply certain colors to the Priority Column of the *Call Browser*. For example, all Preventive Maintenance calls will display green in the priority column. The call priority values are designated in SM tailoring, with 9 being the highest priority on a scale of 1 to 9. In addition to appearing in the *Call Browser*, the priority assigned to the call also appears in the *Call View*.

Viewing technician information

Technician information is displayed on the Dispatch Board in the *Technician Browser* and the *Technician View*.

Technician Browser and Technician View



The *Technician Browser* displays basic information about a set of technicians. You can "browse" through the list and select a technician for assignment, modification, etc. When a technician is highlighted on the browser, detailed information about that technician appears in the *Technician View* directly below it on the *Dispatch Board*.

The *Technician View* offers you a detailed view of the technician selected on the browser. In addition to the abbreviated information available on the browser, the *Technician View* gives specific information about the skills, phone number, etc. of the selected technician. It shows you if the technician is dispatched and where the technician is currently located.

The Technician Browser displays technicians based on your display preference.

- Using the *Display Selection Controls* located below the *Call View*, you may change the *Technician Browser* selection to display technicians that are associated with a selected call.

- Using the *Tech Display* button located below the *Tech View*, you may change the Technician display selection and sort criteria.

See Chapter 4 for a complete discussion of *Display Control* functionality.

Performing tasks: Action buttons, menus and shortcuts

There are several ways to perform actions, commands or functions on the *Dispatch Board*. You can ask the system to perform the task by using an **Action Button**, by using a **Drop Down Menu,** by using **Keyboard Shortcuts** or by using a **Pop-up Menu**. All of these methods produce the same result, letting you choose the method that is most comfortable for you.

Action buttons are activated by placing the mouse on the appropriate button and clicking the left mouse button.

For example, to assign a call to a selected technician, you can click on the **Assign** action button.

Drop down menus are available on the menu bar at the top of the *Dispatch Board*. Options on these menus are used to perform specific tasks.

For example, to assign a call to a selected technician, you can place the mouse pointer on the **Dispatcher Actions** on the menu bar and click the left mouse button. This causes a menu to "drop down" from the menu bar. Move the mouse pointer to the **Assign** selection and release the button to assign the call.

Keyboard shortcuts are available for all action buttons, for the convenience of users who prefer to minimize mouse actions. They are indicated by an underlined letter in the action name, e.g., **Assign**. Press the [Alt] key and the underlined letter to perform the same action as if you clicked the mouse on the action button. This is called the **[Alt] key combination.**

For example, to assign a call to a selected technician, press the **[Alt]** key and hold it down, then press the **[A]** key.

Pop-up menus are available in certain Call Entry Dispatch browsers and windows. When available, a single right mouse click brings a pop-up menu of actions and navigational commands appropriate to the current browser or window. You can select or review an item and, with minimal mouse movement, click and choose an action or a navigation. (See Chapter 4 for more examples.)

For example, to assign a call to a selected technician, select the call from the *Call Browser* and right-click. A popup menu related to the Call Browser appears. Select Assign from that menu by moving the cursor (mouse pointer) to your selection and clicking with the left mouse button.

Dispatcher Action Buttons

There are four buttons that can be termed "dispatcher actions." See Chapter 6 for a complete discussion of *Assigning, Dispatching and Ending Call Assignments*.

This section summarizes using the buttons located at the bottom of the Dispatch Board.

Dispatch Action Buttons

Assign

This button changes a selected call's status to Assigned (A). It also creates a call relationship with the technician to whom the call is assigned.

When using the Assign action button, the system notifies you if you have not selected either a call or technician on the appropriate browser, if the call is already complete, or if the technician is not available.

Unassign

This button changes a selected call's status from Assigned (A) to Queued (Q). This allows you to remove a call's relationship to a specific technician while keeping the call open.

You may not unassign a dispatched call.

Dispatch

This action button dispatches a technician to a call and upgrades the call status to Dispatched (D).

When dispatching a call, the system notifies you if you have not selected either a call or a technician on the Browser, if the technician is already been dispatched to a call, if the call is already complete, or if the technician is not available.

Complete

The Complete action button completes the assignment of the selected technician on the selected call. Whenever you end a dispatched call, the call should be completed. Completing a call updates its call status to **C**.

When you select the Complete action button, you will be presented with a call slip window on which you can enter the information appropriate to the completed call.

Other ways to perform these dispatcher actions are:

Using the **Dispatcher Actions** menu at the top of the screen.

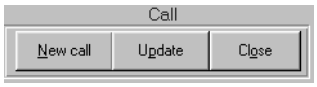
Using the [Alt] key combination indicated by the underlined letter.

Right-clicking in the Call Browser

Call Action Buttons

There are three actions buttons in the Call group. See Chapter 5 for a complete discussion of *Entering Calls.*

Call Action Buttons



New Call

The New Call button allows you to create a new call slip. When you select this button you will see a window that has all the information you need to create a new call.

Update Call

You can use the Update Call button to update an existing call. When you select this button, you will see a window displaying the call detail for the call you selected to update.

Close

The Close call button allows you to close a call that has not yet been dispatched. You may close any queued or assigned call. When you close a queued call, the system will simply verify to you that the call has been closed. If you close a call that has already been assigned, you must verify that the technician should be unassigned from this call. The system will cancel the assignment and close the call.

Other ways to perform these actions are:

- Using the **Call** menu at the top of the screen.
- Using the [Alt] key combination indicated by the underlined letter.
- Right-clicking in the Call Browser

Technicians Action Buttons

The Technician action buttons allow you to perform actions for a selected technician (i.e., the one that is highlighted on the *Technician Browser*) that are independent of a selected Call. There are three buttons in the Technician action button group. See Chapter 7 for a complete discussion of *Technician Actions*.

Technician Action Buttons

Schd Day

Use this action button to display a daily schedule listing of Calls assigned to the selected technician.

Note: There must be information in a call's Scheduled Date field in order for the call to appear in this list.

Schd Month

This action button displays a monthly schedule of tasks that have been assigned to a selected technician, a long term schedule.

Note: There must be information in a call's Scheduled Date field in order for the call to appear in this list.

Messages

This action button brings up a window in which you can create and delete messages for a selected Technician. (A message appears in the Technician View when there is a message for the selected technician.)

Other ways to perform these actions are:

Using the **Technicians** menu at the top of the screen.

Using the [Alt] key combination indicated by the underlined letter.

Right-clicking in the Call Browser

Other Action Buttons

Several other action buttons are located in the bottom portion of the Dispatch Board.

Other Action Buttons

Inquiry

Selecting the Inquiry Action button allows you to view detailed customer site information. You can view Equipment, Accounts Receivable, and Contract Data about a selected site.

Call Display

Use this action button to customize the call display parameters.

Tech Display

Use this action button to customize the Technician display parameters.

Refresh

This action button refreshes the main browsers, causing them to display the most recently entered and updated information.

Exit

Use this action button to leave the Call Entry Dispatch System.

Any unsaved work will be lost. The system will prompt you to save work before exiting.

Other ways to perform these actions are:

Using the **Co<u>n</u>trols** or **D<u>i</u>spatcher Actions** menus at the top of the screen.

Using the [Alt] key combination indicated by the underlined letter.

Right-clicking in the Call Browser or the Technician Browser

Refreshing the *Dispatch Board*

In a single-dispatcher system, there is no need for external refresh. Whenever a call is created, an assignment is changed, etc., the relevant browsers and views are re-drawn. But when several dispatchers are using the database at the same time, changes made by one dispatcher may not be immediately seen by another.

It is not necessary to manually refresh your *Dispatch Board* at a regular interval. There is a timer set-up in the Call Entry Dispatch Board that forces an automatic refresh of the main browsers and corresponding views.

The **Refresh** action button is provided in case the user wants to force an immediate refresh of the system. **Refresh** forces the system to update the *Dispatch Board* with any changes that were made since the last refresh.

Manually refreshing the Dispatch Board

The Dispatch Board refreshes automatically on a predetermined schedule. If you need to refresh it "on the fly", choose one of the following methods.

Click on the **Refresh** button. The **Refresh** action button is located with other action buttons in the lower right of the *Dispatch Board*.

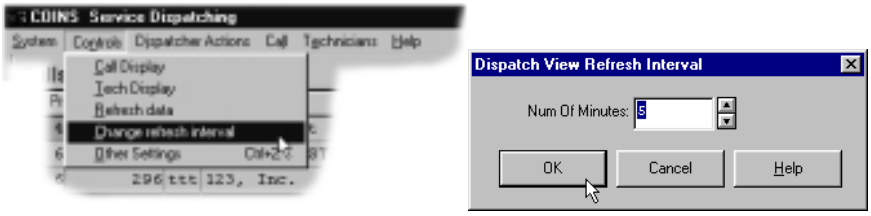
Use the drop-down menu **Controls ➔ Refresh data**.

Press the key combination **[Alt][R]**.

Changing the refresh interval

It is possible to vary the interval at which the *Dispatch Board* is refreshed. Use the drop-down menu to select **Controls ➔ Change refresh interval**. In the window that appears on the screen, enter the desired refresh interval in minutes.

Refresh Interval



Enter the refresh interval in minutes.

In summary

In this chapter, we learned about the basics about using Call Entry Dispatch. We explored the Call Entry Dispatch Board, identified parts of the Dispatch Board screen, and learned how it helps the dispatcher accomplish some typical tasks.

The Self Guided Tour

What this chapter covers…

This chapter will acquaint you with the Call Entry Dispatch system. It provides an overview of the Call Entry Dispatch System and how you can use it to enter, dispatch and close calls:

1. Starting the Call Entry Dispatch system
2. Adjusting *Dispatch Board* view options
3. Entering a call
4. Assigning the call
5. Dispatching the call
6. Ending the call
7. Putting the call on hold
8. Inquiring into call status
9. Closing Call Entry Dispatch

This chapter does not cover all possible actions. It walks you through each step so that you can see the basics of what the system does, focusing on an individual call's movement through the process.

As with the rest of the Call Entry Dispatch Manual, the steps are annotated to indicate if they are:

Required ☑

Optional ☐.

Starting Call Entry Dispatch

☑*Start the Call Entry Dispatch software*

There are several ways to start up the Call Entry Dispatch Board when you want to use it.

1. Double click (using the left mouse button) on the Dispatch shortcut icon created on the Desktop when Call Entry Dispatch was installed on your PC.

2. Click the Windows **Start** button and select the **Dispatch** option. (Look for an option labeled *Version 6 Dispatch* or *Version 7 Dispatch*, depending on the version you installed.)

3. Click the Windows **Start** button, go to **Programs**, and select **GUI Dispatch** from the Programs list.

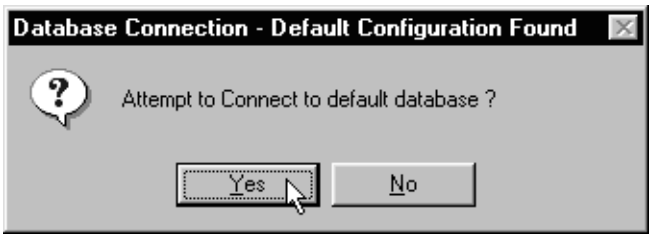
4. Add Call Entry Dispatch to the **Windows Startup** menu, so that it automatically starts up when you start your computer. To do this, click on the **Start** Button. Select **Settings→Taskbar & Start Menu**. Go to the **Start Menu Programs** tab and click on the **Advanced...** button. Copy the Dispatch shortcut, then paste it into the Startup folder.

☑*Connect to the COINS database*

The next thing you need to do is connect to your Service Management system. (See Chapter 1 for detailed instructions on setting up the database connections.)

If you followed the recommendation to set up a default connection (see page xxx in Chapter 1), the system asks: "Attempt to connect to default database?" If you did not set up a default connection, the full Database Connection screen appears.

Connect to the default database



Click **Yes** to connect to the database. If you click **No**, the full Database Connection screen appears so that you may select the database to use.

☑*Log on to Call Entry Dispatch*

The next window to appear is the Logon screen. The logon process identifies you to the system and controls which information you can enter, view or update.

Type your **User ID** and **Password,** if needed, in the appropriate place in the Logon window. Simply click **OK** or press [**Enter]** on your keyboard to Logon. This brings you to the main *Dispatch Board*.

Adjusting *Dispatch Board* view options

After you have entered a valid User ID and Password, the main *Dispatch Board* appears. The way the *Dispatch Board* displays calls and technicians depends on how the display controls and options are set.

Certain display settings are system defaults. For example, each time you open Call Entry Dispatch, the *Dispatch Board* applies the following selections:

- Display Selection: Calls and Techs (no Association)
- Call Status Filter: Queued

See Chapter 4 - Display Options for a complete discussion of display controls.

☐ *Adjust Display Controls*

The display controls for the *Dispatch Board* screen are located just below the Call and Technician Views.

Adjust the *Display Selection* and *Call Status Filter* controls to best show the information you need right now. These controls are designed for "on the fly" use. They will revert back to the defaults the next time you open Call Entry Dispatch

Adjust *Call Display* and *Tech Display* options to change column display order, sort options, and several other settings on a more permanent basis.

Entering a call

See Chapter 5 for detailed information about this process.

As the system's name indicates, Call Entry Dispatch is used to control the entry and dispatch of calls for service. Nearly all actions in Call Entry Dispatch relate to a call, so the first step is to enter a call.

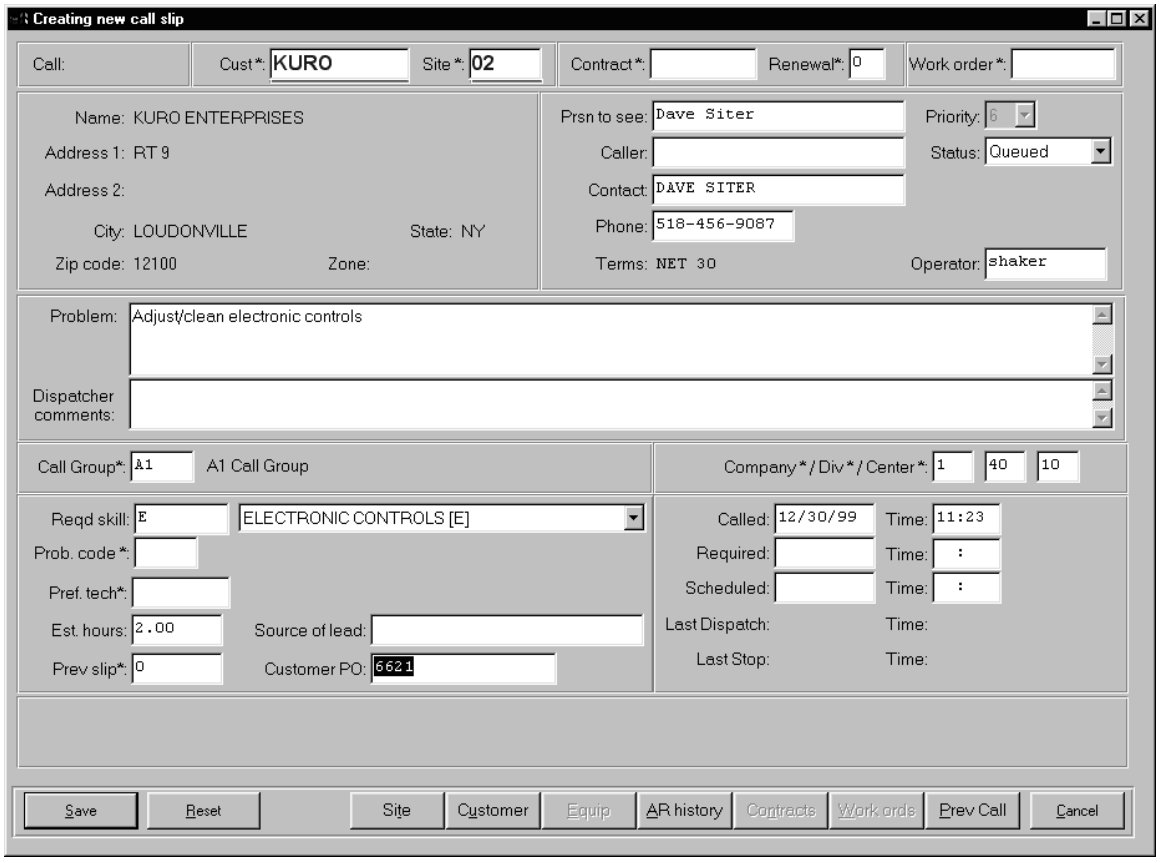
To open the "Creating a new call slip" window:

Click the **New call** button at the bottom of the screen.

Press **[Alt][N]** as indicated by the underlined letter on the New call button.

Use the **Call** menu at the top of the screen. Select **Call→New Call** to create a new call slip.

Creating new call slip



Lookup features are built into the system to simplify selecting important information. You can look up values for any field that has an asterisk next to the label.

To lookup a value, place the cursor in that field and then press [F5] or doubleclick to open the Lookup window.

The lookup screens vary according to the information that is being retrieved. Some screens have detailed search capabilities (e.g., customer and site lookups), while others are simple scrolling lists

Step-by-step Instructions

☑*Select the site*

Enter the codes for the customer and site for this call. You can do both using the Site field because selecting a site automatically fills in the customer information.

You may use the Site lookup to determine the appropriate site for the call. This lookup allows you to scroll through a list of all sites or to search for a site by customer ID or site address, phone, zone or name.

☑*Enter the call details*

The next step is to enter the details for the call. Some information defaults from the selected customer and site, such as the site address, contact information, call group, etc. Other information is entered directly for the call. For example:

- Specify the contract, if appropriate.
- Identify the people at the site to contact relating to this call.
- Describe the problem.
- If there is no contract, a PO number may be required instead (if required for the selected site).

☐*Review the call*

Review the call information prior to saving the call and creating the call slip.

Click the **Reset** button at the bottom of the screen to clear all the information entered since the call was last saved. **Be careful - if this is a new call, Reset will clear all information.**

☑*Create the call*

After you have entered all the available information, you save the call and create the call slip. To do this:

Click the **Save** button at the bottom of the screen.

Press **[Alt][S]** as indicated by the underlined letter on the Save button.

☑*System confirms call entry*

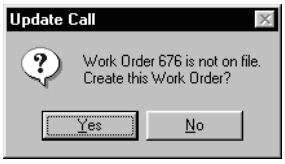
A dialog box pops up to confirm that the call has been entered. The new call is accessible through the Call Browser, so it can be updated, dispatched, etc., as needed.

If the system is unable to enter the call as you requested, the system displays an error message instead, indicating the problem.

☐*Create Work Order*

You may see a prompt asking whether you want to create a work order for this call.

Create work order



COINS Service Management Tailoring includes an option to **Default Work Order from Call Slip #.** When this is turned on (set to **Y**), Call Entry Dispatch prompts you to create the work order whenever you exit the call entry screen until the work order number has been assigned. This means that you will see this prompt when creating a new call or updating, dispatching or completing an existing call.

- If you click **Yes**, the prompts differ between Version 6

and Version 7 of COINS. In Version 7, the system asks for the appropriate batch (if using batches in COINS Service Management). In Version 6, the system prompts for the Work Order Fiscal Date.

- If you click **No**, the system returns you to the main *Dispatch Board*.

☐ *Enter additional calls*

After a call has been created, the system prompts you to enter another call. This feature is useful for a person who primarily takes customer calls and creates the call slips.

- If you click **Yes**, a blank "Create new call slip" screen appears and you are ready for the next call.
- If you click **No**, the system returns you to the main *Dispatch Board*.

Assigning a call to a technician

Assigning a call to a technician establishes a relationship between the technician and the call that makes it easier to dispatch a technician to the call later. This process changes the call's status from **Q** (queued) to **A** (assigned).

Note: The call may seem to "disappear" as soon as it is assigned. The call still exists, it is simply not visible using the current call status filter. Change the Call Status Filter to show **Assigned** calls or **All (except Closed)** if you need to update the call slip.

A call is automatically assigned to a technician if the S/M Tailoring option **Preassign calls to Pref Tech** is set to **Y** and there is a **Pref. tech*** (Preferred Technician) on the screen when you create the call. The preferred technician may default from the service site or be entered directly on the call.

Step-by-step Instructions

☑*Select a call*

Use the Display Controls to sort and limit the calls displayed in the *Call Browser*. For example, you can set the controls to see only queued calls.

Select the call you wish to assign by highlighting it in the *Call Browser*.

Detailed information about this call appears in the *Call View*.

☑*Select a technician*

Once you have selected the call to assign, you can use the Display Controls to determine the specific technician you wish to assign to the call.

Select the technician you wish to assign by highlighting him/her in the *Technician Browser*.

The *Technician View* shows information about the selected technician. Verify that the technician has any skills required for the selected call by checking the *Technician View*.

☐*View technician's schedule*

Check the daily or monthly schedule of the selected technician in order to avoid any schedule conflicts. Schedule conflicts display in bright blue.

This can be done by:

Click on the **Schd Day** or **Schd Month** action button.

Use the **Technicians** menu at the top of the screen. Select **Technicians →Schd Day** or **Technicians →Schd Month** to view the schedule for the selected technician.

Press **[Alt][Y]** or **[Alt][M]** as indicated by the underlined letters on the action buttons.

☑*Assign the call*

You have selected the call and the technician, and their detailed information appears in the *Call View* and *Technician View*. Clicking the **Assign** action button assigns the selected call to the selected technician and changes the call's status to **A** (assigned).

This can be done by:

Clicking on the **Assign** action button

Using the **Dispatcher Actions** menu at the top of the screen. Select **Dispatcher Actions→Assign**

Pressing **[Alt][A]** as indicated by the underlined letter on the action button

Right-clicking in the Call Browser and selecting **Assign** from the pop-up menu

Dispatching the technician to a call

You can dispatch a technician on any service call that is not completed or closed.

- You may dispatch more than one technician to a call.
- You may dispatch technicians to a call without first assigning them to that call.
- You cannot dispatch a technician to more than one call at a time.

Step-by-step Instructions

☑*Select a call*

Use the Display Controls to sort and limit the calls displayed in the *Call Browser*. For example, you can set the controls to see only assigned calls without considering their association with technicians.

Select the call you wish to dispatch by highlighting it in the *Call Browser*.

Detailed information about this call appears in the *Call View*.

☑*Select a technician*

Once you have selected the call to dispatch, you can use the Display Controls to select the technician(s) you wish to dispatch to the call.

Select the technician you wish to assign by highlighting him/her in the *Technician Browser*.

The *Technician View* shows information about the selected technician. Verify that the technician has any skills required for the selected call by checking the *Technician View*.

☐*View technician's schedule*

Check the daily or monthly schedule of the selected technician in order to avoid any schedule conflicts. Schedule conflicts

display in bright blue.

This can be done by:

Click on the **Schd Day** or **Schd Month** action button.

Use the **Technicians** menu at the top of the screen. Select **Technicians →Schd Day** or **Technicians →Schd Month** to view the schedule for the selected technician.

Press **[Alt][Y]** or **[Alt][M]** as indicated by the underlined letters on the action buttons.

☑ *Dispatch the call*

You have selected the call and the technician, and their detailed information appears in the *Call View* and *Technician View*. Clicking the **Dispatch** action button dispatches the selected call to the selected technician and changes the call's status to **D** (dispatched).

This can be done by:

Clicking on the **Dispatch** action button

Using the **Dispatcher Actions** menu at the top of the screen. Select **Dispatcher Actions→Dispatch**

Pressing **[Alt][D]** as indicated by the underlined letter on the action button

Right-clicking in the Call Browser and selecting **Dispatch** from the pop-up menu

☐ *Update call detail*

The *Call Detail* window for this call displays, on which to enter information relating to the call's dispatch.

Once you have made any changes or corrections, click on the **Save** action button in the lower left of the *Call Detail* window (or press the [Alt][S] key combination) to save the changes to the call, dispatch the technician to it, and return to the *Dispatch Board*.

☐ *Create Work Order*

After reviewing the call detail, you may see a prompt asking whether you want to create a work order for this call. When COINS Service Management is tailored to **Default Work Order from Call Slip #**, Call Entry Dispatch prompts you to create the work order whenever you exit the call entry screen until the work order number has been assigned.

Ending the call

By "Ending the call" we mean that the work is complete. In this case, you want to end the call assignment and close the call. This scenario is described below.

Do not use the following steps if the work is not complete but you need to place the call "on hold" for parts, a credit check or other reasons. See **Putting a call on Hold** later in this chapter for the correct procedure.

Step-by-step Instructions

☑*Select a call*

Use the Display Controls to sort and limit the calls displayed in the *Call Browser*.

Select the call you wish to close by highlighting it in the *Call Browser*.

Detailed information about this call will appear in the *Call View*.

☑*Select a technician*

Once you have selected the call to be closed, adjust the Display Selection control to show **Techs Associated to Selected Call**. The *Technician Browser* now shows only technicians assigned or dispatched to this call. (If any technicians are currently dispatched to the call, the call number and site will appear in the Technician Browser.)

Note: The call cannot be completed until each technician assignment has been resolved.

Select the first technician by highlighting him/her in the *Technician Browser*.

☑*Complete the call*

Once the technician and the call have both been selected, you can complete the call. This can be done by:

- Clicking on the **Complete** action button
- Using the **Dispatcher Actions** menu at the top of the screen. Select **Dispatcher Actions→Complete**
- Pressing **[Alt][C]** as indicated by the underlined letter on the action button
- Right-clicking in the Call Browser and selecting **Complete** from the pop-up menu

If multiple technicians were assigned or dispatched to the call, you must repeat this process for all the technicians as well before the call is completed and closed.

☑*Review and update Call Detail*

When all the assignments and dispatches are completed, the system displays the Call Detail window for the call. This gives you an opportunity to review the call information one more time and to enter information relating to completing the call.

Once you have made any changes or corrections, click on the **Save** action button in the lower left of the *Call Detail* window. You may also press the [Alt][S] key combination to continue.

After you save the call information, the call status changes to **C**. You can see it on the *Dispatch Board* when you set the Call Status Filter to view Closed calls only.

☐*Create Work Order*

After reviewing the call detail, you may see a prompt asking whether you want to create a work order for this call. When COINS Service Management is tailored to **Default Work Order from Call Slip #**, Call Entry Dispatch prompts you to create the work order whenever you exit the call entry screen until the work order number has been assigned. If the prompt is still appearing, you may want to create the work order now.

Putting a call on Hold

Sometimes the work on a service call is not complete but you need to place the call on hold or wait status. This frees any technicians assigned or dispatched to the call for other work.

There are several types of "holds" for service calls, which are all entered in a similar manner:

- Hold (credit)
- Parts hold
- Wait (other)

See Chapter 6 for more information on placing calls on hold.

Step-by-step Instructions

☑*Select a call*

Select the call you wish to hold by highlighting it in the *Call Browser*. Detailed information about this call will appear in the *Call View*.

☑*Review technicians associated with the call*

Once you have selected the call you need to hold, adjust the Display Selection control to show **Techs Associated to Selected Call**. The *Technician Browser* now shows any technicians assigned or dispatched to this call.

If any technicians are currently dispatched to the call, the call number and site will appear in the Technician Browser. You must end the dispatch before you can place the call on hold. See **Ending the call** on page 55 for details.

☑*Update the call status*

If the call has already been dispatched, first complete the dispatch (see above). If the call has not been dispatched, you can go ahead and place the call on hold. Placing a call on hold does not affect its assignment to specific technicians.

A call is placed on hold by changing the call's status. This is

done through the Call Detail screen, opened by one of the following options:

Clicking on the **Update** action button at the bottom of the screen

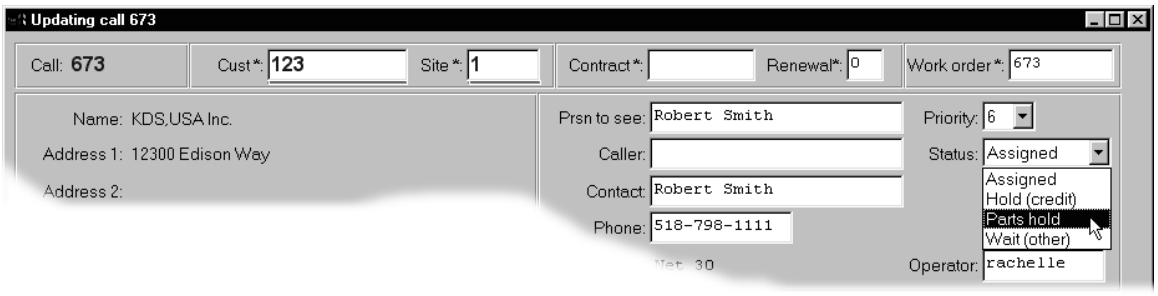
Using the **Call** menu at the top of the screen. Select **Call→Update call**

Pressing **[Alt][P]** as indicated by the underlined letter on the action button

Right-clicking in the Call Browser and selecting **Update** from the pop-up menu

The *Call Detail* window for this call displays. In the Status box, click the arrowhead that points down. From the list of available statuses, select the one that best fits your situation.

Call Detail Window



You can enter comments about this hold in the **Comments** field at the bottom of the screen.

When you are done, click on the **Save** action button in the lower left of the *Call Detail* window or press the **[Alt][S]** key combination to save your changes, place the call on hold and return to the *Dispatch Board*.

☐*Create Work Order*

If you have set-up your COINS Service Management module (in Tailoring) to “Default Work Order from Call Slip #” and the work order does not already exist, you will be prompted to create the work order when the call entry screen has been completed.

Closing Call Entry Dispatch

Make sure you save work in any open Call Detail windows before leaving Call Entry Dispatch. **Otherwise, any unsaved work will be lost.**

☑*Exit the system*

Use one of the following methods close Call Entry Dispatch:

- Clicking on the **Exit** action button near the bottom right side of the screen
- Using the **System** menu at the top of the screen. Select **System→Exit**
- Pressing **[Alt][E]** as indicated by the underlined letter on the action button
- Clicking the Close symbol on the outside corner of the *Dispatch Board* window.

☑*Close the Application Manager*

Close the Application Manager using one of the following methods:

- Using the **System** menu at the top of the screen. Select **System→Exit**
- Clicking the Close symbol.

In summary

In this chapter, we followed one call through the different aspects of the call entry/dispatch process.

The remainder of this manual provides detailed instructions on these functions, as well as more advanced or less common tasks.

Display Options

What this chapter covers…

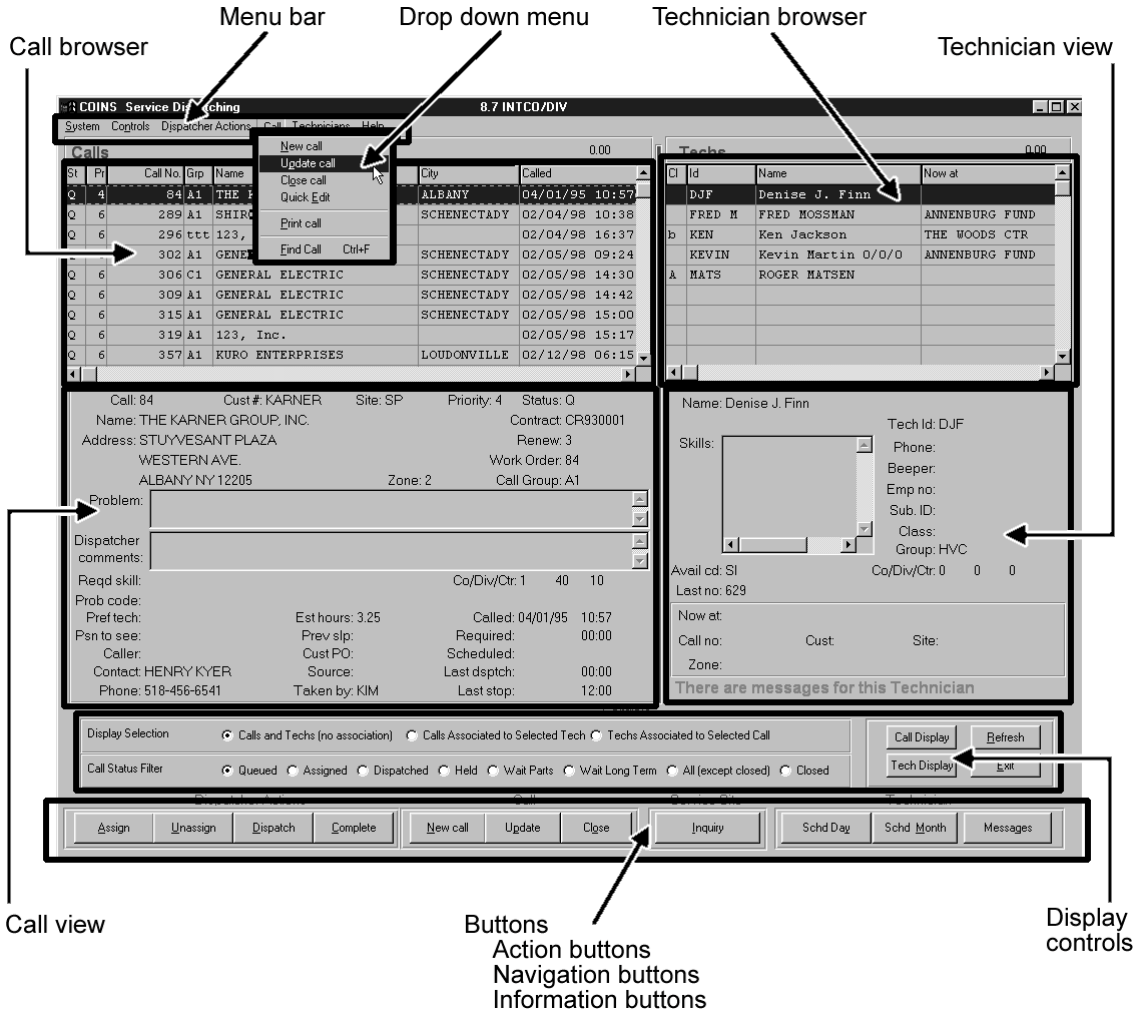
This chapter provides information about the display options available in the Call Entry Dispatch System. It shows you how to customize your *Call* and *Technician Browser*s using the display control buttons, display selections, and call status filters built into Call Entry Dispatch. It also provides information on the popup menus found throughout the Call Entry Dispatch System.

Understanding these features will help you to make optimal use of the call and technician information you have available.

Using Display Controls for the Call Browser

The main Dispatch Board is divided into several functional areas, as illustrated below. The next few pages focus on the *Call Browser* and *Call View*.

Dispatch Board



Note: The Co/Div/Ctr fields shown in the Call View and Technician View appear only in Version 7.

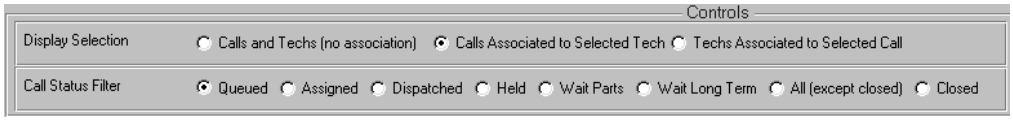
The *Call Browser* lists basic call information. You can "browse" through the list and select a call for action. Call Entry Dispatch selects the calls for Call Browser according to the display controls set on the main Dispatch Board.

The *Call View* offers you a detailed view of the call selected on the browser. It shows call information such as address, contact person, problem description, status, etc.

Display Selection Options

Controls near the bottom of the Dispatch Board let you display calls in the Call Browser based on their association to Service Technicians. As soon as you change the Display Selection, the information in the *Call Browser* changes to reflect the new selection.

Display Selection options



Calls can be displayed using the following *Display Selection* options:

Calls and Techs (no association)

Displays all calls (depending on *Call status* selection) in the *Call Browser* and all technicians in the *Technician Browser*.

Calls Associated to Selected Tech

Displays only the calls associated with the technician selected (highlighted) on the *Technician Browser*. This selection is also affected by the *Call Status* option. For example, you can choose to display **Assigned** calls associated to a selected technician.

Techs Associated to Selected Call

Displays only the technicians associated with the call selected (highlighted) on the *Call Browser*. This selection is also affected by the *Call Status* option. For example, you can choose to display technicians associated with **Held** calls.

Call Display Options

The **Call Display** button, located in the lower right corner of the Dispatch Board, controls the way the Call Browser system sorts the calls for display. There are two different Display Option screens; both are shown on the pages that follow. The

first appears when the Display Selection is set to **Calls and Techs (no association)** or **Techs Associated to Selected Call**. The other is used when the Call Browser is set to show **Calls Associated to Selected Tech**.

Display Controls

To review or update the Call Display options:

Click the **Call Display** button at the bottom of the screen.

Use the **Controls** menu at the top of the screen. Select **Controls→ Call Display** to change the display controls for the Call Browser.

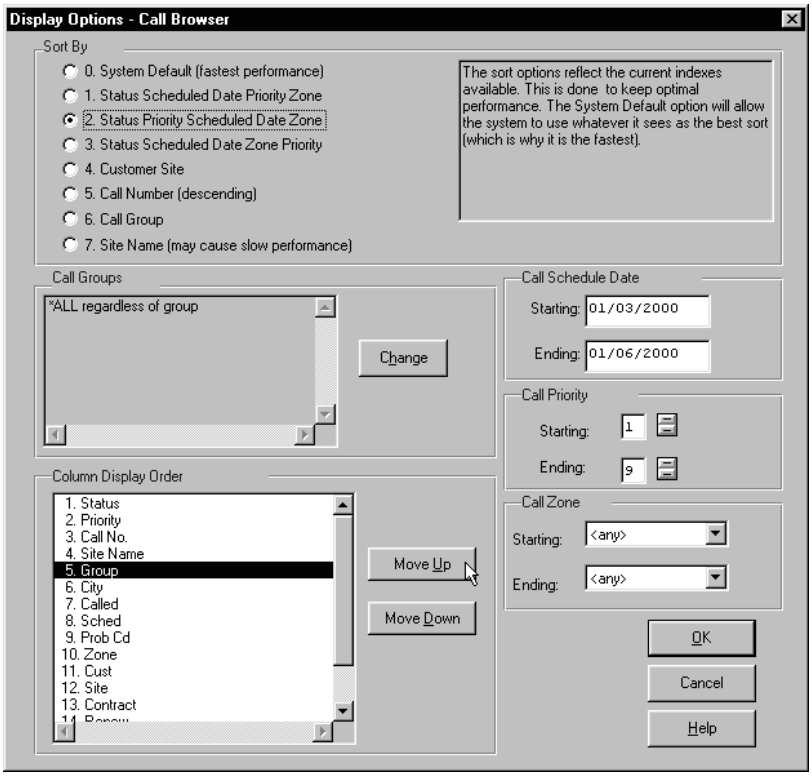
Right-click in the **Call Browser** and select the Call Display option from the popup menu.

Display Options: Calls and Techs (no Association) or Techs Associated to Selected Call

If you are using the Call Browser for **Calls and Techs (no association)** or **Techs Associated to Selected Call**, the following Display Options window appears. It allows you to select calls for the Call Browser and control how they appear in a variety of ways:

- Sort order
- Call groups (available in Version 7 only)
- Column display order
- Scheduled dates for calls
- Call priority
- Call zone

Display Options - Call Browser



Sort order

There are currently eight ways to sort the calls that appear in the Call Browser:

0.	System Default	Allows the system to select the sort that provides the optimal system performance
1.	Status Scheduled Date Priority Zone	Sorts calls based first on Status, then Scheduled Date, then call Priority and finally Zone
2.	Status Priority Scheduled Date Zone	Sorts calls based first on Status, then Priority, then Scheduled Date, and finally Zone
3.	Status Scheduled Date Zone Priority	Sorts calls based first on Status, then Scheduled Date, then Zone and finally Priority
4.	Customer Site	Sorts calls by Customer Site
5.	Call Number (descending)	Sorts calls by call number, highest call number (i.e., most recent) first
6.	Call Group	Sorts calls based on the Call Group associated with the call
7.	Site Name	Sorts calls alphabetically by the service site name; may cause slow performance

Call groups (available in Version 7 only)

This part of the screen allows you to select calls for the Call Browser based on call group. Each call can have a call group added to it during call entry, either as a default from the service site or a code chosen during the Enter Call process.

Use this field to limit the calls displayed in the Call Browser to a select list of call groups. Only calls belonging to the call groups listed here will appear in the Call Browser.

If you don't use call groups in your system, or if you want to include all calls, be sure to set this to ***ALL regardless of group**.

Column display order

Large as the Dispatch Board is, there is a finite amount of visible space in the Call Browser. To minimize the need to scroll sideways, the system lets you change the order of the columns displayed so that the information most important to you displays first.

To do this, click on the column name and select the appropriate button (Move Up or Move Down) to reorder the display.

Scheduled dates for calls

This part of the screen allows you to select calls for the Call Browser based on the call's scheduled date.

You can limit the calls displayed in the Call Browser to calls scheduled for a particular day or range of days. However, any calls without a scheduled date will also appear in the browser.

Call priority

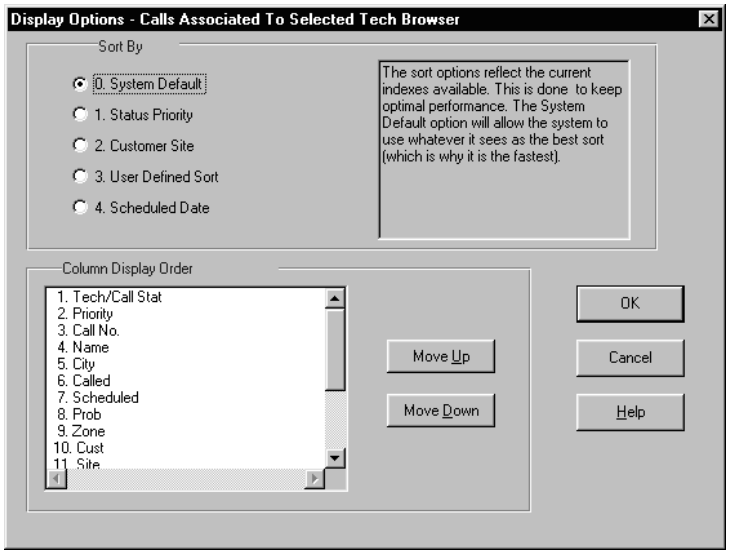
This part of the screen allows you to select calls for the Call Browser based on call's current priority. Higher numbers are higher priority.

The priority of a call is set when the call is created, based on defaults set in COINS S/M tailoring for new calls, PM call slips and rescheduled calls. It may be updated thereafter through Update Calls.

Calls Associated to Selected Techs

If you are using the **Calls Associated to Selected Techs** Call Browser, the Display Options window (shown below) lets you control the sort order and column order in the Call Browser.

Display Options - Calls Associated to Selected Techs


Display Options - Calls Associated To Selected Tech Browser
Sort By
0. System Default
1. Status Priority
2. Customer Site
3. User Defined Sort
4. Scheduled Date
The sort options reflect the current indexes available. This is done to keep optimal performance. The System Default option will allow the system to use whatever it sees as the best sort (which is why it is the fastest).
Column Display Order
1. Tech/Call Stat
2. Priority
3. Call No.
4. Name
5. City
6. Called
7. Scheduled
8. Prob
9. Zone
10. Cust
11. Site
Move Up
Move Down
OK
Cancel
Help

Sort order

There are five ways to sort the calls that appear in the Call Browser when you are viewing only calls associated with the selected technician:

0.	System Default	Allows the system to select the sort that provides the optimal system performance
1.	Status Priority	Sorts the technician's calls based first on Status, then call Priority
2.	Customer Site	Sorts the technician's calls by Customer Site
3.	User Defined Sort	Sorts the technician's calls according to a separate "sort definition." Once you have selected a technician, you can define the way that technician's calls are sorted using the User Defined Sort option.
4.	Scheduled Date	Sorts the technician's calls by Customer Site

Column display order

To minimize the need to scroll sideways, the system lets you change the order of the columns displayed so that the information most important to you displays first. To do this, click on the column name and select the appropriate button (Move Up or Move Down) to reorder the display.

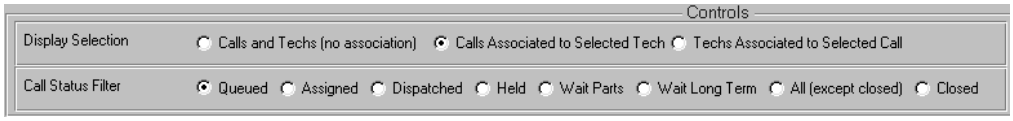
Call Status Options

You can display the calls in the *Call Browser* based on call status.

As soon as you change the Call Status Filter, the information in the *Call Browser* changes to reflect the new selection. This allows you to move between display options as often as you need to. For example, you may need to check something on a dispatched call, so you would select the **Dispatched** call status option and, after getting the needed information, select the **Queued** option to continue reviewing, assigning and dispatching calls.

You can select any of these *Call Status* display options by simply clicking on the appropriate radio (round) button.

Call Status Filter



Queued (Q)

Calls waiting for action by the dispatcher. The default status for new calls is Q.

Assigned (A)

Calls that have been assigned to at least one technician as a "to do" item. Technicians can have several calls pre-assigned to them, but can only be dispatched to one at a time.

Dispatched (D)

Calls that have currently been dispatched to at least one technician.

Held (H)

Calls currently on hold for a short time, waiting for credit approval. This code will keep a call high on the list, for action as soon as the hold is resolved.

Wait Parts (P)

Calls waiting for parts before dispatch.

Wait Long Term (W)

Calls that are being held for a longer period of time, for a variety of reasons.

All (except closed)

Any call that has not been completed or voided.

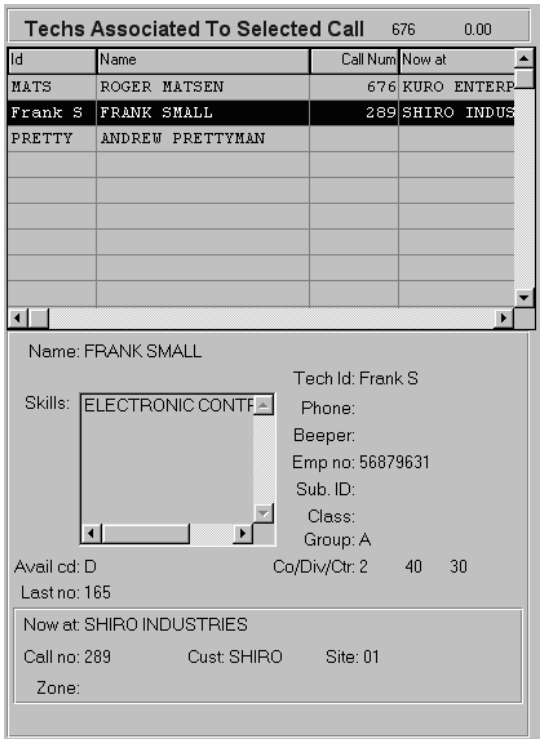
Closed (C)

Calls that have been completed or voided.

Using Display Controls for the Technician Browser

The right-hand side of the main Dispatch Board is dominated by the Technician Browser and Technician View.

Technician Browser and Technician View



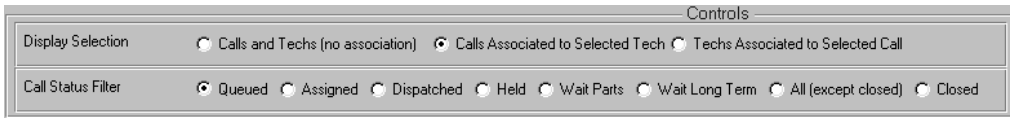
The *Technician Browser* displays basic information about a set of technicians. You can "browse" through the list and select a technician for assignment, modification, etc.

The *Technician View* offers you more detailed information about the selected technician, such as current location, skills, phone number, etc.

Display Selection Options

Controls near the bottom of the Dispatch Board let you display technicians based on their association with calls. You can display all Techs or just Techs Associated to Selected Call. As soon as you change the Display Selection, the information in the *Technician Browser* changes to reflect the new selection.

Display Selection options



Technician Display Options

The **Tech Display** button, located near the lower right corner of the Dispatch Board, controls the way the Technician Browsers sorts the technicians for display.

There are two different Display Option screens; both are shown on the pages that follow. The first appears when the Display Selection is set to **Calls and Techs (no association)** or **Calls Associated to Selected Tech**. The other is used when the Call Browser is set to show **Techs Associated to Selected Call**.

Display Controls

To review or update the Tech Display options:

- Click the **Tech Display** button at the bottom of the screen.
- Use the **Controls** menu at the top of the screen. Select **Controls→ Tech Display** to change the display controls for the Call Browser.
- Right-click in the **Tech Browser** and select the Tech Display option from the popup menu.

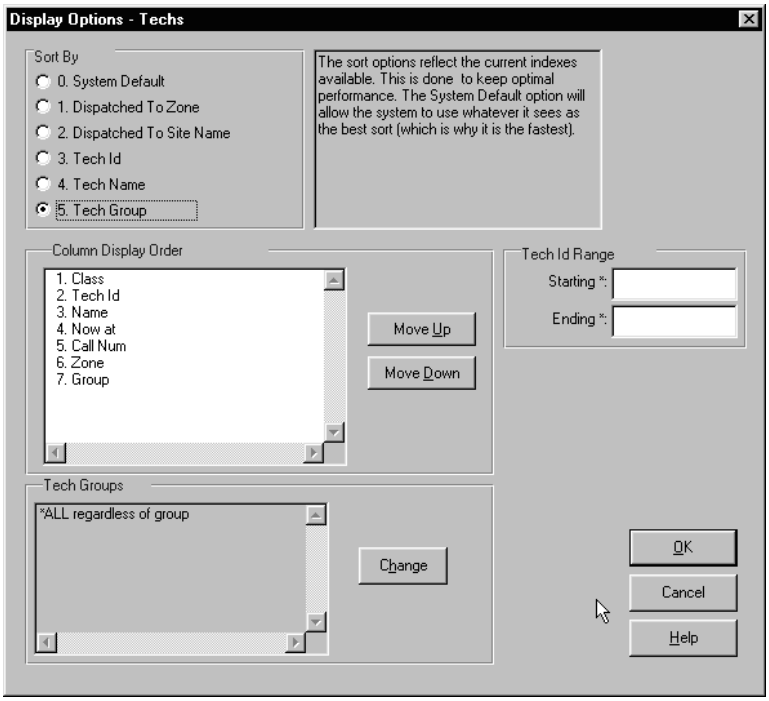
Display Options: Calls and Techs (no Association) or Calls Associated to Selected Tech

If you are using the Tech Browser for **Calls and Techs (no association)** or **Calls Associated to Selected Tech**, the following Display Options window appears. It allows you to select calls for the Tech Browser and control how they appear

in a variety of ways:

- Sort order
- Column display order
- Tech groups
- Range of tech IDs (in Version 7 only)

Display Options - Tech Browser



Sort order

As the sample window demonstrates, the technicians that appear on the *Technician Browser* can be sorted in several ways.

0.	System Default	Allows the system to select the sort that provides the optimal system performance
1.	Dispatched To Zone	Sorts the technicians based on the zone to which they have been dispatched.
2.	Dispatched To Site Name	Sorts the technicians based on the site to which they have been dispatched

3. Tech ID	Sorts the technicians by ID code; available in Version 7 only
4. Tech Name	Sorts the technicians alphabetically by name; available in Version 7 only
5. Tech Group	Sorts the technicians according to the Tech Group to which they have been assigned; available in Version 7 only

Column display order

Large as the Dispatch Board is, there is a finite amount of visible space in the Tech Browser. To minimize the need to scroll sideways, the system lets you change the order of the columns displayed so that the information most important to you displays first.

To do this, click on the column name and select the appropriate button (Move Up or Move Down) to reorder the display.

Tech groups

This part of the screen allows you to select calls for the Tech Browser based on Tech Group. Each technician code can have a Tech Group associated with it in the Service Management Technician File.

Use this field to limit the technicians displayed in the Tech Browser to a select list of technician groups. Only technicians belonging to the groups listed here will appear in the Tech Browser.

If you don't use tech groups in your system, or if you want to include all technicians, be sure to set this to ***ALL regardless of group**.

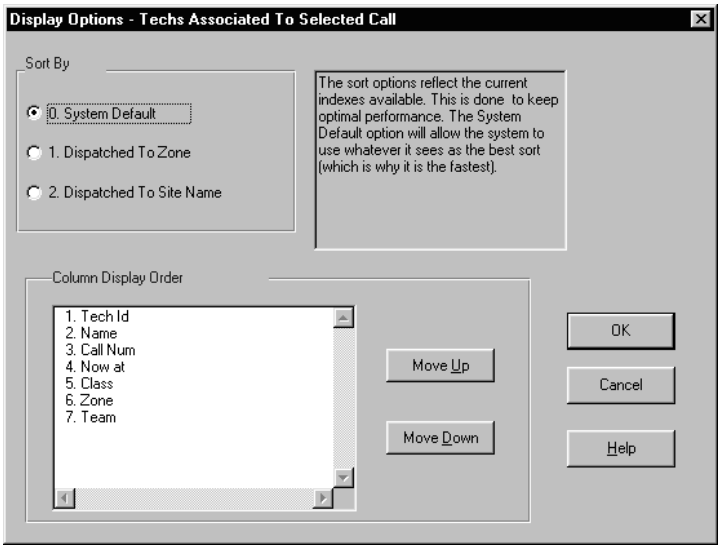
Tech ID Range

You can limit the technicians displayed by Tech ID by entering starting and ending Tech IDs in these fields. To show all technicians, leave them blank.

Techs Associated to Selected Call

If you are using the **Techs Associated to Selected Call** Tech Browser, the Display Options window (shown below) lets you control the sort order and column order in the Tech Browser.

Display Options - Tech Browser


Display Options - Techs Associated To Selected Call
Sort By
0. System Default
1. Dispatched To Zone
2. Dispatched To Site Name
The sort options reflect the current indexes available. This is done to keep optimal performance. The System Default option will allow the system to use whatever it sees as the best sort (which is why it is the fastest).
Column Display Order
1. Tech Id
2. Name
3. Call Num
4. Now at
5. Class
6. Zone
7. Team
Move Up
Move Down
OK
Cancel
Help

Sort order

There are three ways to sort the calls that appear in the Tech Browser when you are viewing only technicians associated with the selected call:

0. System Default	Allows the system to select the sort that provides the optimal system performance
1. Dispatched to Zone	Sorts the technicians according to the zone where they are currently dispatched
2. Dispatched To Site Name	Sorts the technician according to the site where they are currently dispatched

Column display order

To minimize the need to scroll sideways, the system lets you change the order of the columns displayed so that the information most important to you displays first. To do this, click on the column name and select the appropriate button (Move Up or Move Down) to reorder the display.

In Summary

In this chapter, we explored the various display options available in the Call Entry Dispatch system. We learned how to modify the *Call Browser* and *Technician Browser* and how we can control the way the browsers are sorted.

Entering Calls

What this chapter covers...

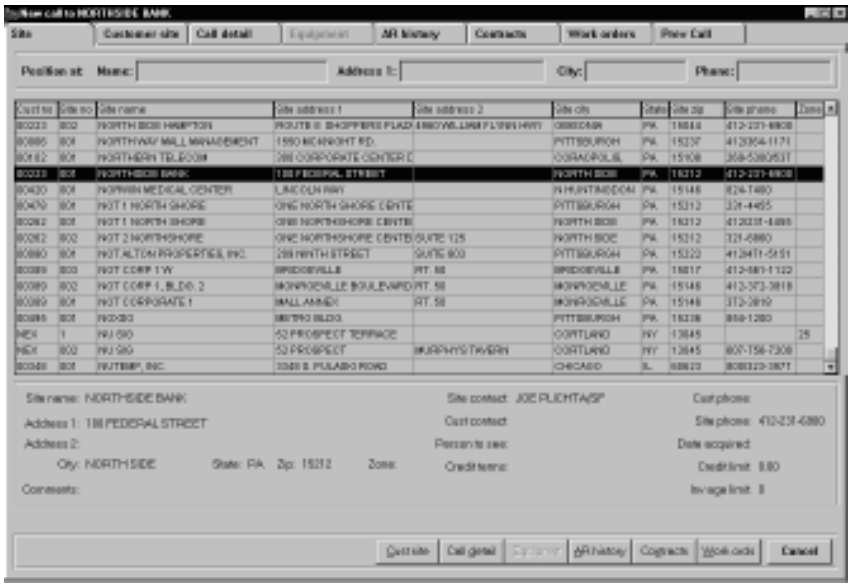
This chapter provides detailed information and step by step instructions for the entry, update and management of Service Management calls.

It will help you to carry out the basic call entry procedures and also take full advantage of the options and features available for call entry in the GUI Dispatch System.

Call Detail Notebook

Whenever you enter a **New call** or **Update** an existing call, you will see the *Call Detail Notebook*. It is called a *Notebook* because it consists of several *Pages*, represented by the tab folders along the top of the screen.

Some of the tab folders may be dimmed. This means that there is not a page in this notebook for that particular topic. For example, there may not be any contracts on file for a given customer site.



The *Call Detail Notebook* consists of the following pages:

Site Page

Allows direct choice of a customer site, based upon you entry of a site's name, address, city or phone.

Customer Site Page

Helps select a site by selecting a customer. Gives you valuable information and the ability to add/update a customer/site.

Call Detail Page

Enter and create the Call.

Equipment Page

Review the equipment associated with a Call's site.

A/R History Page

Review the A/R history associated with a Call's customer.

Contracts Page

Select (or just review) the Contracts associated with a Call's site. It is only accessible when the currently selected customer site has contracts.

Work Orders Page

Allows you to assign an already defined work order to the Call Slip.

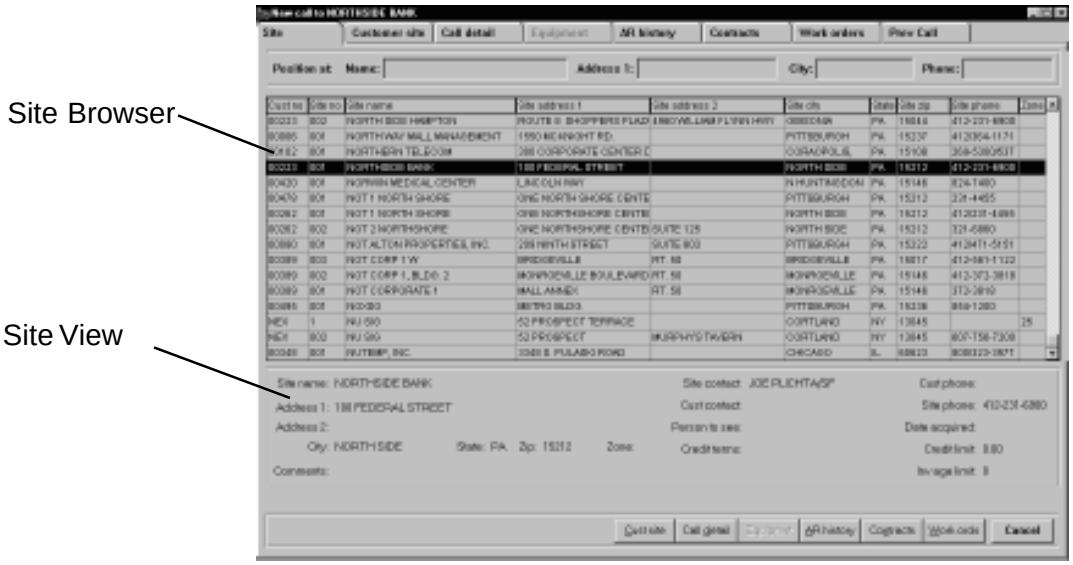
Prev Calls Page

Allows you to view and select information about previous service calls.

You can select a page from the notebook by clicking on the appropriate tab folder along the top of the window. You may also select a page by using the navigational action buttons located at the bottom of the *Call Detail Notebook* or by pressing the appropriate keystrokes, for example, **[Alt][C]** for the *Customer Site* page.

Site Page

The first page you see when you open the *Call Detail Notebook* is the Site Page.

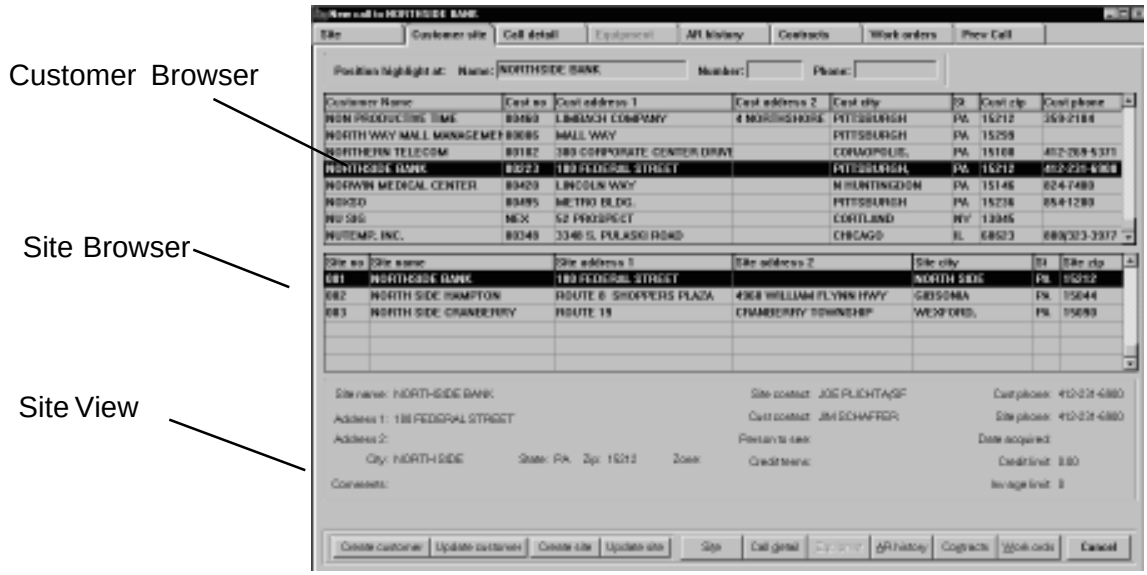


The *Site* page provides a way to lookup a site using what ever information you may have available. You can find the customer site by entering the name, address, city or phone number. As you enter data, the system tries to match that information with a customer site on file. When it has found a match, it highlights the site in the *Site Browser* and displays the site information in the *Site View*.

Selecting a site on the *Site* page causes the system to retrieve the corresponding customer and to adjust the *Call Detail Notebook* pages to reflect the selection.

Customer Site Page

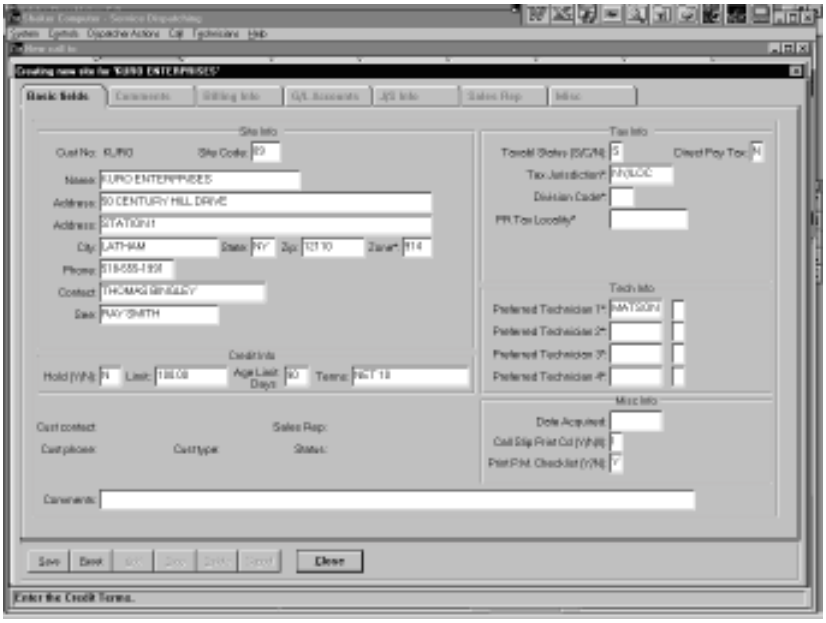
If you cannot locate the site you are looking for, you can try to locate the customer through the *Customer Site* page.



The *Customer Site* page provides a way to lookup a customer using the customer name, customer number or phone number. When you enter the data, the system tries to match that information with a customer on file. When it has found a match, it highlights the customer in the *Customer Browser.* The sites for the highlighted customer appear in the *Site Browser*, with the first site listed the default selection. The site information appears in the *Site View.*

Create a Site

If you are unable to locate the site but have located the appropriate customer, use the **Create Site** action button to create the customer site on the fly.



Fill the screen with the information appropriate to the site. Press the **Save** button (or use the [Alt] key combination) to save information as you work on the screen. Use **Reset** to revert to last saved version of the information. Upon completing the entry, use **Close** to leave the screen and return to call entry.

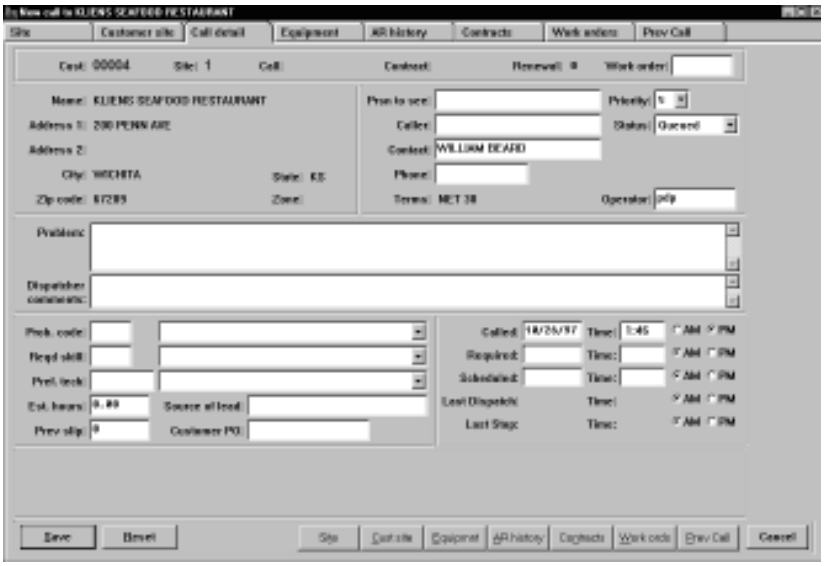
Create a Customer

If you are unable to locate the customer for the call, use the **Create Customer** action button to create the customer. You will then need to go ahead and create the site before you can enter a call.

As when creating a site record, fill in the screen with the appropriate information. Use the **Save**, **Reset** and **Close** actions as described above.

Call Detail Page

The *Call Detail* page represents the Call Entry part of the *Call Detail Notebook*.

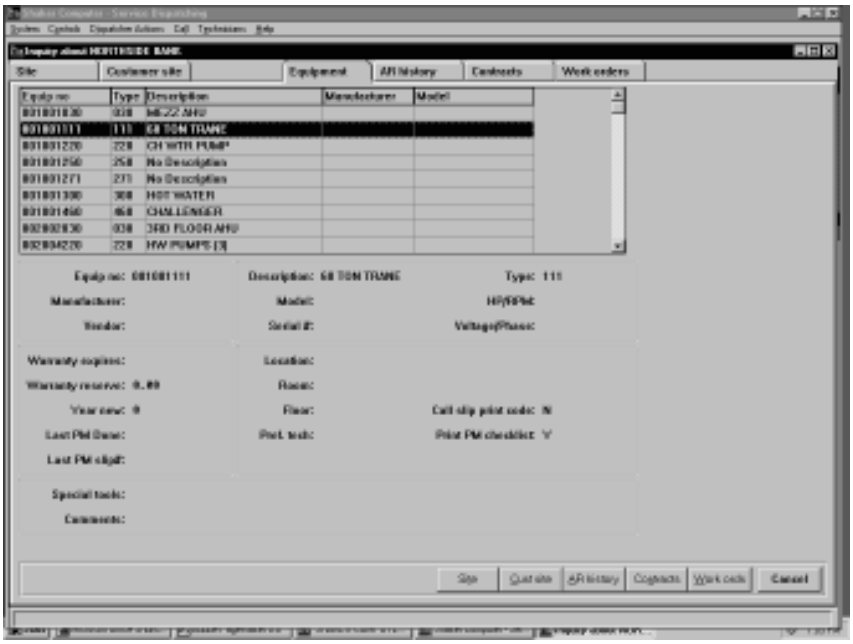


After you have selected the appropriate site and customer, the system fills in the *Call Detail* Page window. Enter the data specific to this call, priority, contact person, problem code, etc. Click on the **Save** action button to save and create a new call. Pressing the [Alt] key combination also saves the call.

There is also a **Reset** action button on this page. Use this button to clear all data fields except those that were set based upon your original site selection and restore them to their original values. Pressing the [Alt] key combination also resets the call fields.

Equipment Page

The *Equipment* page lets you review the equipment associated with the selected customer site.



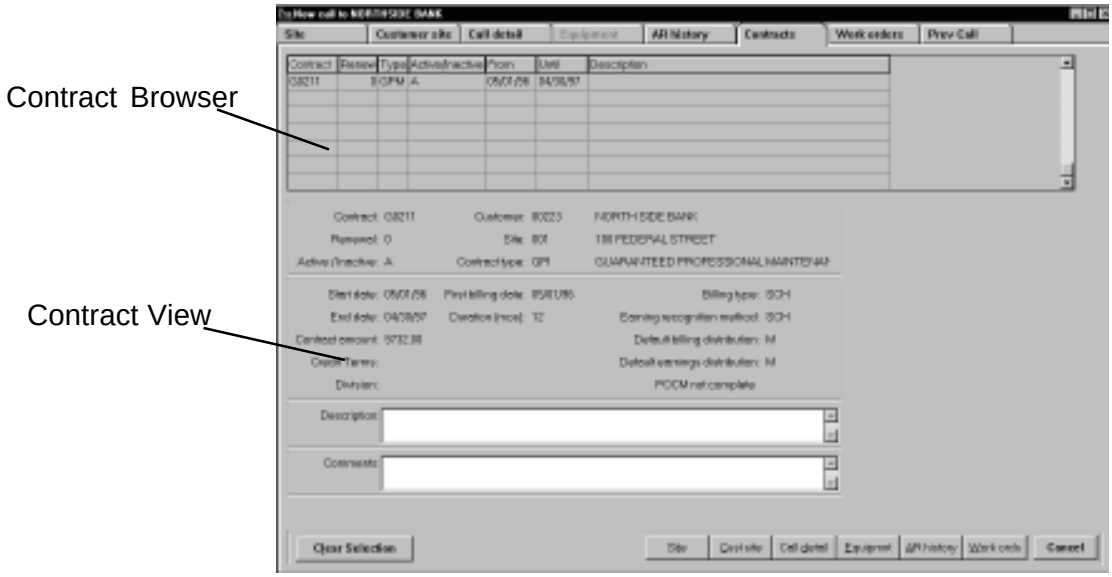
A/R History Page

The *A/R History* page allows you to review the A/R history of the call's customer.

You will see the customer's credit limit, receivable balance and a brief invoice aging report.

Contracts Page

The *Contracts* page allows you to review and/or select the contracts for the selected customer site. The tab will be dimmed if there are no contracts on file for the site.

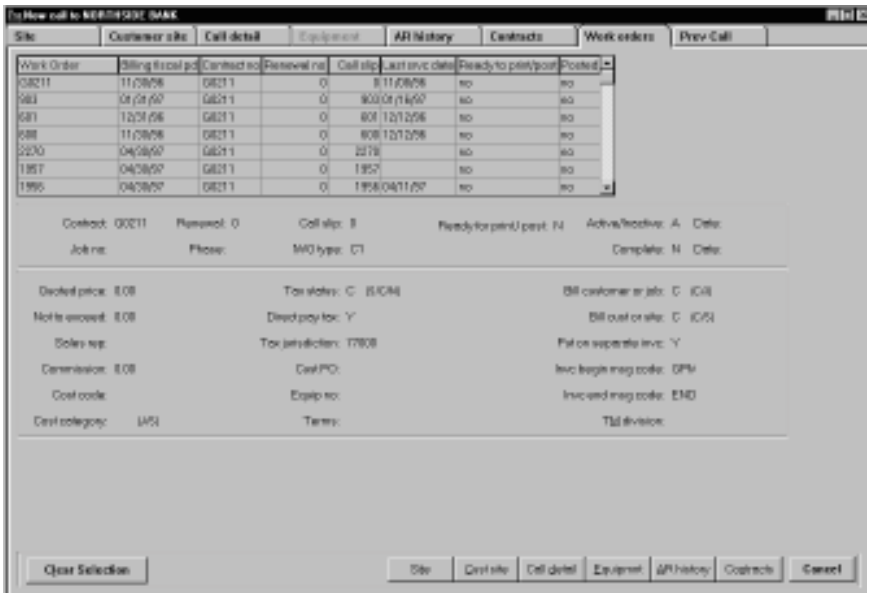


Use the *Contract Browser* to locate the appropriate contract by highlighting it. The *Contract View* will give you detailed information about the selected contact.

The call is associated with the highlighted contract. If you elect not to associate this call with a contract, click the **Clear selection** action button to clear the contract.

Work Orders Page

The *Work Orders* page allows you to view and/or select existing work orders for the chosen customer site.

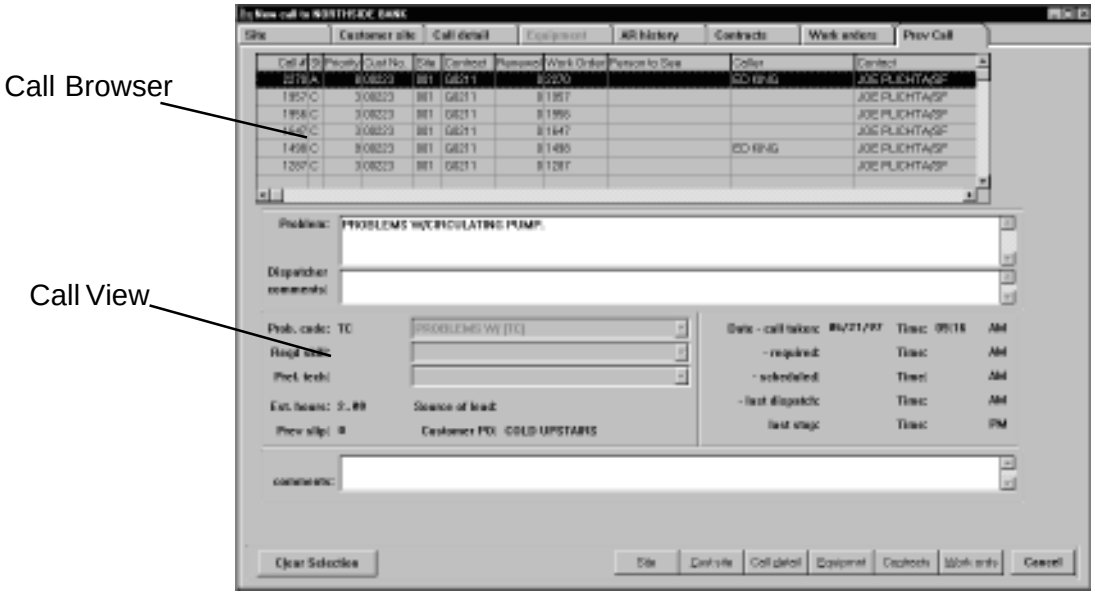


Use the *Work Order Browser* to locate the appropriate contract by highlighting it. The *Work Order View* will give you detailed information about the selected work order.

If the call is not associated with an existing work order, click the **Clear selection** action button to clear the work order.

Prev Call Page

The *Prev Call* page allows you to view and/or select information about previous service calls made to this site. You can browse through the calls using the Call Browser and view detailed information in the Call View.



Enter Call

Use the **New Call** action button the *Dispatch Board* to enter service calls as they are phoned in. You can enter the *Call Detail Notebook* by clicking on the **New Call** button. You can also use the drop-down menu **Call ➔ New Call** or press the [Alt] key combination.

Step-by-step Instructions

☑*Select the customer site*

Use the *Site Page* or *Customer Site Page* to determine the appropriate site for this call. You can find the customer site by entering the name, address, city or phone number.

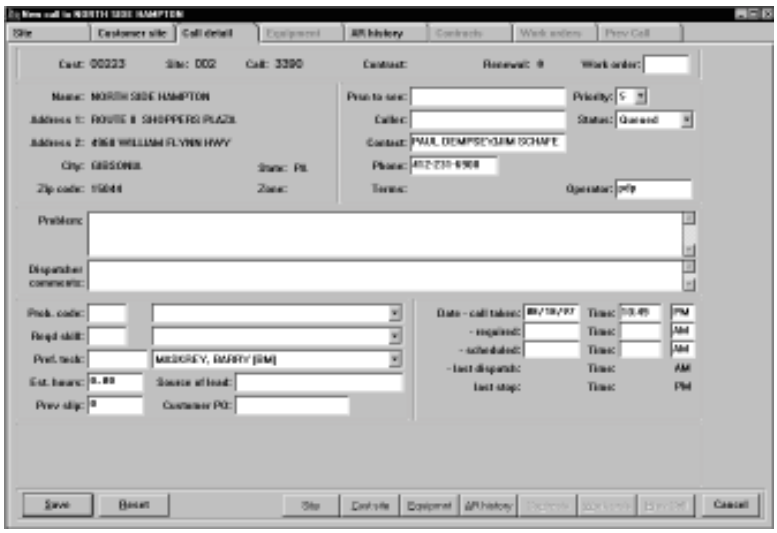
You can select the site by either:

1) Highlighting the site and turning to the *Call Detail Page*
2) Double-clicking on the requested site.

Selecting a site on the Site page causes the system to retrieve the corresponding customer and to adjust the *Call Detail Notebook* pages to reflect the selection.

☑*Enter call detail*

Use the *Call Detail Page* to enter the service call. Much of the information in the *Call Detail Page* window will already be filled in from the selected site.



You should enter data specific to this call. You can update any text field that is enabled.

☐ *Review related customer site information*

Review the *Call Detail Notebook* pages to gather or update any information you need.

Select a notebook page by clicking on the appropriate tab folder along the top of the window. You may also select a page by using the navigational action buttons located at the bottom of each *Call Detail Notebook* page or by pressing the [Alt] key combination.

☑ *Create the call*

After you have entered all the available information, you can create the call. Simply click on the **Save** action button in the lower left of the *Call Detail* page. You can also use the [Alt] key combination.

This creates the call and makes it accessible to the *Dispatch Board*.

Update Call

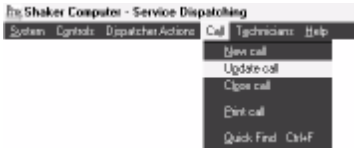
It is sometimes necessary to update the call information for a given call slip. For example, the client may call back with a P/O or contract number for the call or to provide more details about the reported problem.

Step-by-step Instructions

☑*Select the call*

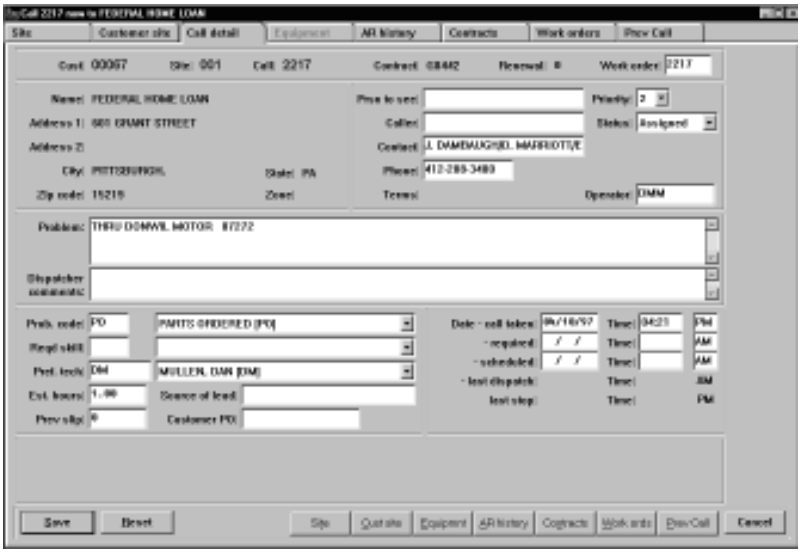
Use the Display Controls to sort and limit the calls displayed in the *Call Browser*. Select the call you wish to update by highlighting it in the *Call Browser*. Detailed information about this call will appear in the *Call View*.

☑*Update call detail*



Once you have selected the call to be updated, simply click on the **Update** Action Button to enter the Call Detail Notebook for the selected call.

You can also begin the update procedure by using the menu command **Call ➔ Update call**, by using the [Alt] key combination, or by double-clicking on the selected call. In addition, there is a **Pop-up Menu** available in GUI Dispatch call browsers and windows that has an **Update** option.



You can update any text field that is enabled.

☐*Review related customer site information*

You can review the *Call Detail Notebook* pages to gather or update any information you need.

You can select a page from the notebook by clicking on the appropriate tab folder along the top of the window. You may also select a page by using the navigational action buttons located at the bottom of the *Call Detail Notebook* or by pressing the appropriate the [Alt] key combination.

☑*Save the call*

After you have entered all the available information, you can save the updated information. Simply click on the **Save** action button in the lower left of the *Call Detail Page.* You can also use the [Alt] key combination as a shortcut.

The call will be updated and appear in the *Call Browser*.

Close Call

In rare situations, it may be necessary to close a service call using the **Close** call action button on the *Dispatch Board*.

This is very rarely used. In general calls should be closed using **Complete** when dispatching calls. See Chapter 5 for additional information about the Complete function.

Once a call is closed, it cannot be reopened. It will appear in the *Call Browser* when the **Closed** call status display selection is chosen.

However, there are occasions you may wish to close a call in this manner. For example, if you accidentally enter a service call twice you would want to close, and essentially delete, the duplicate call.

Step-by-step Instructions

☑*Select the call*

Use the Display Controls to sort and limit the calls displayed in the *Call Browser*. Select the call you wish to close by highlighting it in the *Call Browser*. Detailed information about this call will appear in the *Call View*.

☑*Close the call*

Once you have selected the call to be closed, simply click on the **Close** call action button to close the selected call. You can also use the drop-down menu **Call ➔ Close call** or the [Alt] key combination shortcut. In addition, there is a **Pop-up Menu** available in GUI Dispatch call browsers and windows that has an **Close** option.

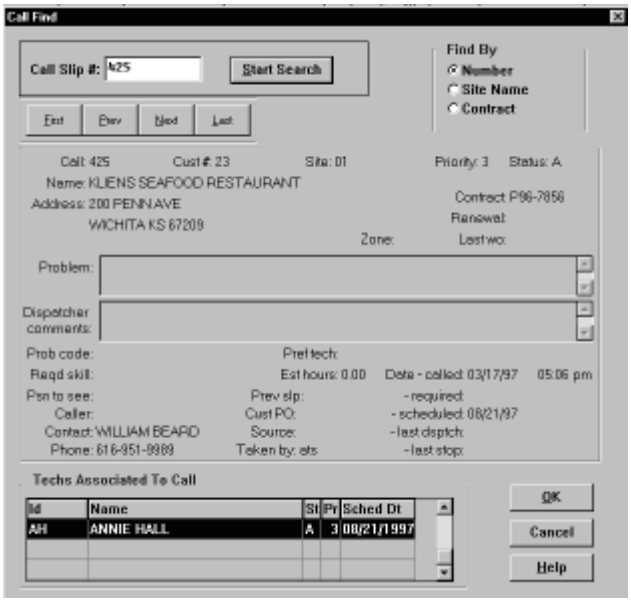
- If there technicians assigned to this call, a dialog box prompts you to end the assignment. Click **Yes** to end it and the system will confirm that the assignment has been ended.
- You cannot close a dispatched call. If you attempt to do so, a dialog box will inform you of the error.

The system will confirm that the call has been closed.

Find Call

The **Find Call** feature offers a fast way to locate a call when the call number is known.

Use the drop-down menu **Call ➔ Find Call** or the keyboard shortcut **[Ctrl][F]**. This window will appear:



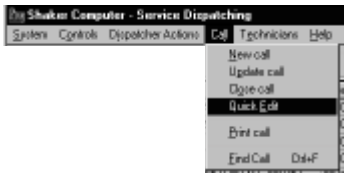
You may search for the call by call slip number, site name or contract number. Enter the search information and click on **Start Search** or press **[Enter]** on your keyboard. If a matching call slip is found, some detail information appears in the window including a list of technicians associated with the call.

> There is a **Pop-up Menu** available from this screen that will allow you to Dispatch, Complete, Unassign, etc. the selected call.

If this is the call you want, click **OK**. The window will close and the *Call Browser* will be repositioned at the selected call.

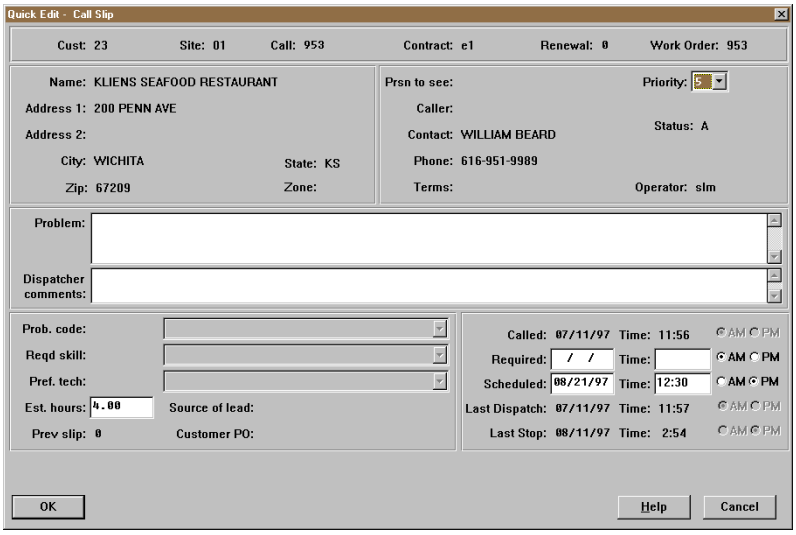
Quick Edit

The ***Quick Edit*** feature provides a quick way to review or edit basic call information.



Use the drop-down menu **Call ➔ Quick Edit** or the [Alt] key combination**.** You can also use **Quick Edit** from a pop-up menu in views that display call information.

You can edit and save call information from this window



In Summary

In this chapter, we explored the *Call Detail Notebook* and its various pages. We learned the steps necessary to enter, update and close service calls.

Assigning, Dispatching and Ending Call Assignments

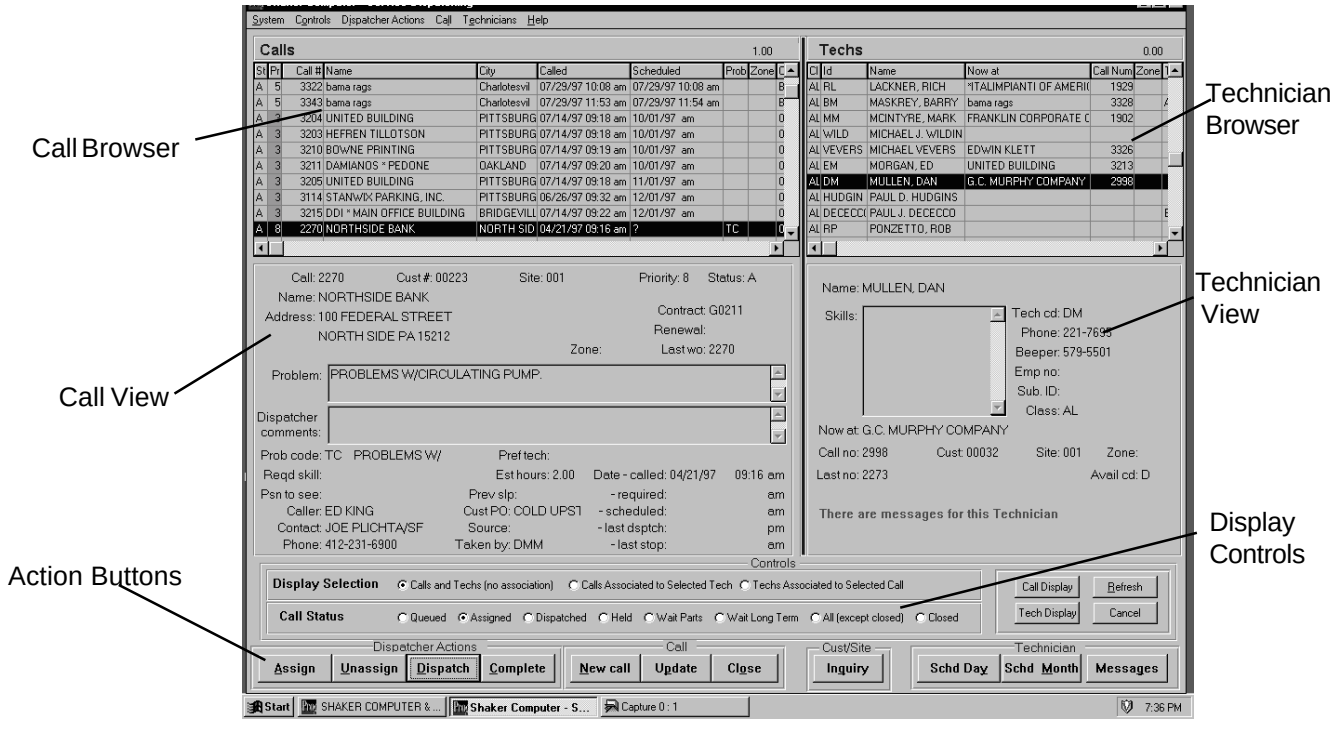
What this chapter covers...

This chapter provides detailed information and step by step instructions for assigning, dispatching and completing Service Management calls.

It will help you to carry out the basic tasks of a dispatcher and to also take full advantage of the options and features available in the GUI Dispatch System.

Assign a Call to a Technician

Assigning a call to a technician establishes a relationship between the technician and the call that makes it easier to dispatch a technician to the call later.



Dispatch Board

Note: It is not necessary to assign calls to a technician in order for them to be dispatched. It is possible to dispatch a technician on a call that still has a Queued (Q) status.

Step-by-step Instructions

☑*Select a Call*

Use the Display Controls to sort and limit the calls displayed in the *Call Browser*. For example, you can set the controls to see only queued calls with no association to a Technician.

Select the call you wish to assign by highlighting it in the *Call Browser*. Detailed information about this call will appear in the *Call View*.

☑*Select a Technician*

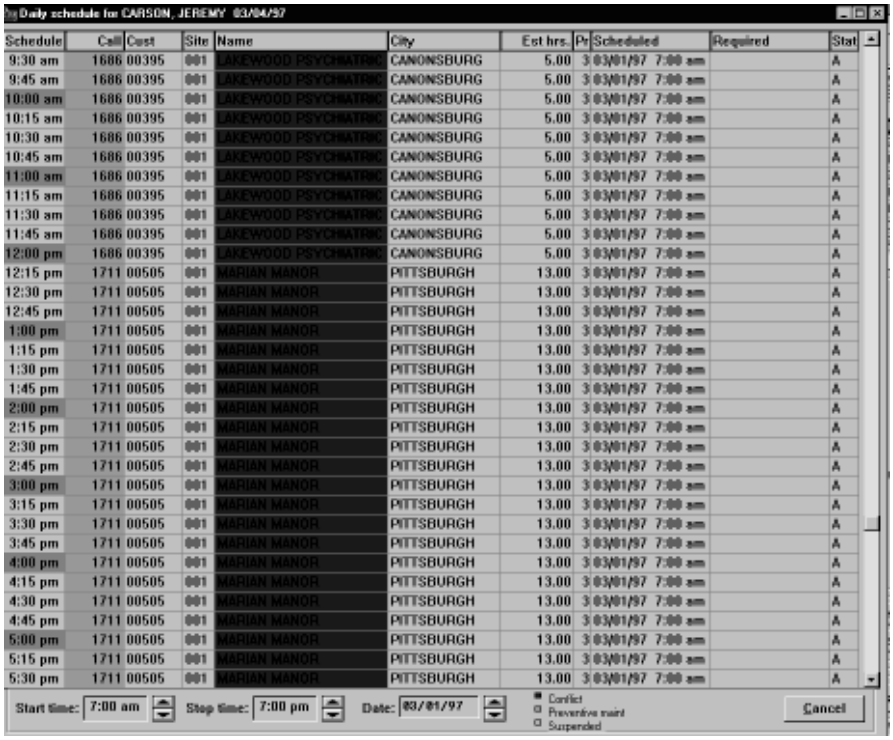
Once you have decided which call you need to assign, you can use the Display Controls to determine the specific technician you wish to assign to the call.

Select the technician you wish to assign by highlighting him/her in the *Technician Browser*. The *Technician View* shows information about the selected technician. You should verify that the technician has any skills required for the selected call. These skills are listed in the *Technician View*.

☐*Technician's schedule*

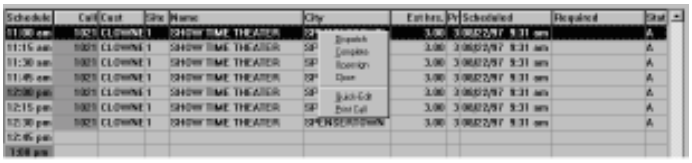
Check the schedule of the selected technician by clicking on the **Schd Day** action button. You can also use the drop-down menu **Technician ➔ Schd Day**, press the [Alt] key combination or position the cursor over the Technician Browser and right-click for the pop-up menu.

This brings up the Schedule window for this technician.



Use this daily schedule to help further determine if this technician can be assigned to the selected call.

It is possible to modify a call from the technician schedule screen. A single click on the right (or non-primary) mouse button will produce the following pop-up menu:



Highlight the desired function and you will be placed in the appropriate screen.

When assigning future calls, for example Preventive Maintenance calls, you can check the technician's monthly schedule by clicking on the **Schd Month** Technician Action Button.

See Chapter 6 for detailed information about checking technicians' schedules.

☑*Assign the Call*

Once you have determined the appropriate technician for the selected call, simply click on the **Assign** Action Button to assign the selected call (displaying in the *Call View*) to the selected technician (displaying in the *Technician View*).

You can also assign this call by using the menu command **Dispatcher Actions ➔ Assign**, by pressing the [Alt] key combination, or by using the pop-up menu.

Unassign a Call Assigned to a Technician

It is possible to Unassign a selected call from a selected technician.

Step-by-step Instructions

☑*Select a Call*

Use the Display Controls to sort and limit the calls displayed in the *Call Browser*. For example, use the controls to see only assigned calls.

Select the call you wish to unassign by highlighting it in the *Call Browser*. Detailed information about this call appears in the *Call View*.

☑*Select a Technician*

Once you have selected the call to unassign, you can use the Display Controls to determine the technician(s) assigned to the call by selecting the Display Selection Techs Associated to Selected Call.

Select the technician you wish to unassign by highlighting him/her in the *Technician Browser*. The *Technician View* shows information about the selected technician.

☑*Unassign the Call*

Once the technician and the call have both been selected, you can unassign the call. Simply click on the **Unassign** Action Button to unassign the selected call (displaying in the *Call View*) and the selected technician (displaying in the *Technician View*).

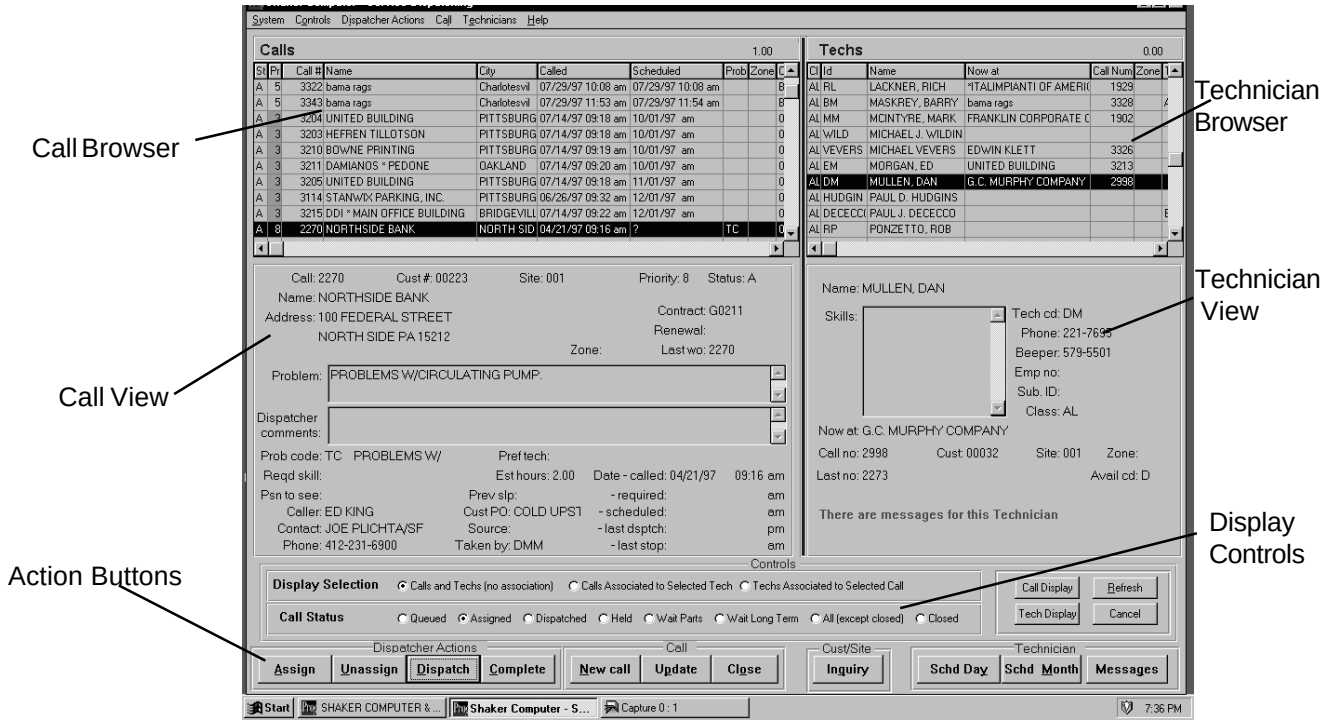
Dispatching Calls

You can also unassign this call by using the menu command **Dispatcher Actions ➔ Unassign**, by pressing the [Alt] key combination, or by using the pop-up menu.

It is not possible to Unassign a dispatched call. Once a call has been dispatched the dispatch can only be ended by completing the call.

Dispatch technician to a call

You can dispatch a technician (or several technicians) on any service call that is not completed or closed.



Dispatch Board

Step-by-step Instructions

☑*Select a Call*

Use the Display Controls to sort and limit the calls displayed in the *Call Browser*. For example, to see assigned calls with no association to a Technician, select the Calls and Techs (no association) Display Control and the Assigned Call Status Control.

Select the call you wish to dispatch by highlighting it in the *Call Browser*. Detailed information about this call will appear in the *Call View*.

☑*Select a Technician*

Once you have selected the call to dispatch, use the Display Controls to determine the specific technician you wish to dispatch to the call.

Select the technician you wish to assign by highlighting him/her in the *Technician Browser*. The *Technician View* shows information about the selected technician. Verify that the technician has any skills required for the selected call. These skills are listed in the *Technician View*.

Use the technician schedule options to verify the availability of the selected technician. For more information about checking technician schedules see Chapter 6.

☑*Dispatch the call*

Once the technician and the call have both been selected, you can dispatch the call. In order for the call dispatch to work:

- The technician cannot be dispatched to any other calls, since the system only allows a technician to be dispatched to a single call.
- The technician's status must be available for dispatch, according to its definition in the Technician Status File.
- The call's status cannot be Closed (C). Technicians can be dispatched on calls with an Assigned (A), Queued (Q) or Dispatched (D) status.

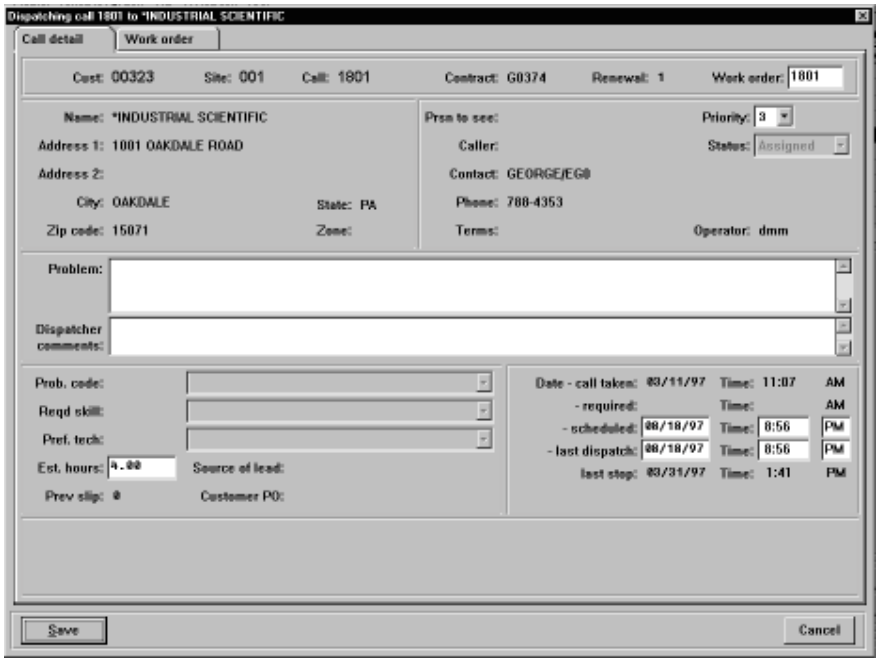
Use the **Dispatch** Action Button to dispatch the selected technician (displaying in the *Technician View*) to the selected call (displaying in the *Call View*).

You can also dispatch this call by using the menu command **Dispatcher Actions ➔ Dispatch**, by pressing the [Alt] key combination or by using the pop-up menu.

☐*Update call entry*

The *Call Detail* window for this call displays, giving you the chance to enter information relating to the call's dispatch. You can enter or update information in the following areas:

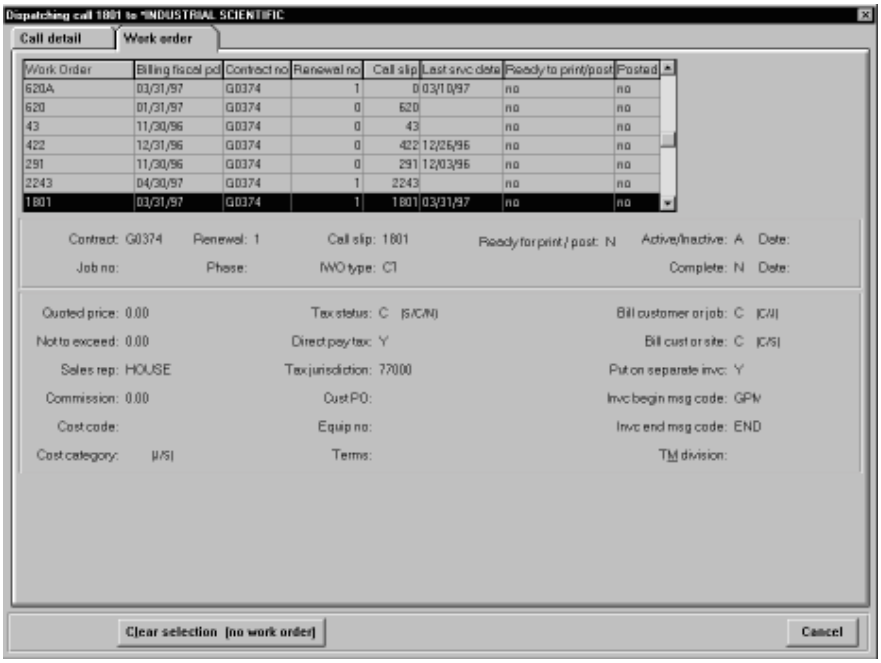
Work Order	Priority
Problem (text)	Estimated Hours
Dispatcher Comments	Last Dispatch



As you can see, the areas that can be updated in the window are "enabled" so that data can be entered.

Dispatching Calls

You can review or select the work order history for this site by selecting the Work Order page tab at the top of the window. You will see a window view similar to the one shown here:



Once you have made any changes or corrections, click on the **Save** Action Button in the lower left of the *Call Detail* window to dispatch the call and return to the *Dispatch Board*.

Note: If the call has not been previously assigned, the dispatch command will simultaneously assign and dispatch the call.

End Call Assignment

After the work is completed on the call, or if the call needs to be put on hold, you should end that call dispatch.

Completed Call

When the service has been completed, you can complete the dispatch as well. This will let you update the call detail information and remove the call from the open call list.

☑*Select a call*

Use the Display Controls to sort and limit the calls displayed in the *Call Browser*. Select the call you wish to close by highlighting it in the *Call Browser*. Detailed information about this call will appear in the *Call View*.

☑*Select a technician*

Once you have selected the call to close, use the Display Controls to determine the technician(s) currently dispatched to the call. Select the appropriate technician by highlighting him/her in the *Technician Browser*.

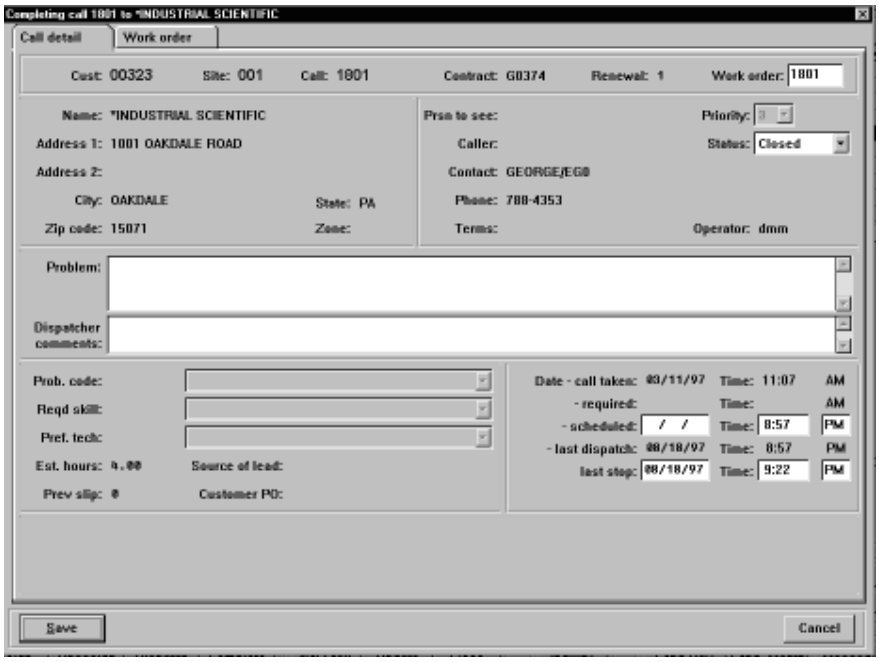
☑*Complete the call*

Once the technician and the call have both been selected, you can complete the call.

Use the **Complete** Action Button to complete the selected call (displaying in the *Call View*).

You can also complete this call by using the menu command **Dispatcher Actions ➔ Complete**, pressing the [Alt] key combination or using the pop-up menu.

The *Call Detail* window for this call displays.



You can enter or update information in the following areas:

Work Order
Problem (text)
Dispatcher Comments (text)
Scheduled (date and time)
Last Stop (date and time)

Verify that the call's status is **Closed**. This is the default selection.

You may also view the work order history for this site by selecting the *Work Order* page tab at the top of the window.

Once you have made any changes or corrections, click on the **Save** Action Button in the lower left of the *Call Detail* window to close the call and return to the *Dispatch Board*.

☐*Create work order*

If you have set-up your COINS Service Management module (in Tailoring) to "Default Work Order from Call Slip #" and the work order does not already exist, you will be prompted to create the work order when the call entry screen has been completed.

- If you respond **Yes** to the dialog box, you will be prompted to enter the appropriate Work Order Fiscal Date.

- If you respond **No**, you will be returned to the *Dispatch Board*.

If more than one technician is assigned to a call, all assignments must be ended before you can close the call. When you complete a call that has more than one technician dispatched to it, you will be prompted to reassign the technician(s).

Hold for Credit

It is possible to put a call on hold pending credit approval. This is a short term hold and keeps the call available for immediate action as soon as the credit issue is resolved.

☑*Select a call*

Use the Display Controls to sort and limit the calls displayed in the *Call Browser*. Select the call you wish to hold by highlighting it in the *Call Browser*. Detailed information about this call will appear in the *Call View*.

☑*Select a technician*

Once you have decided which call you need to hold, use the *Display Controls* to determine the technician(s) currently dispatched to the call. Select the appropriate technician by highlighting him/her in the *Technician Browser*.

☑*Hold the call*

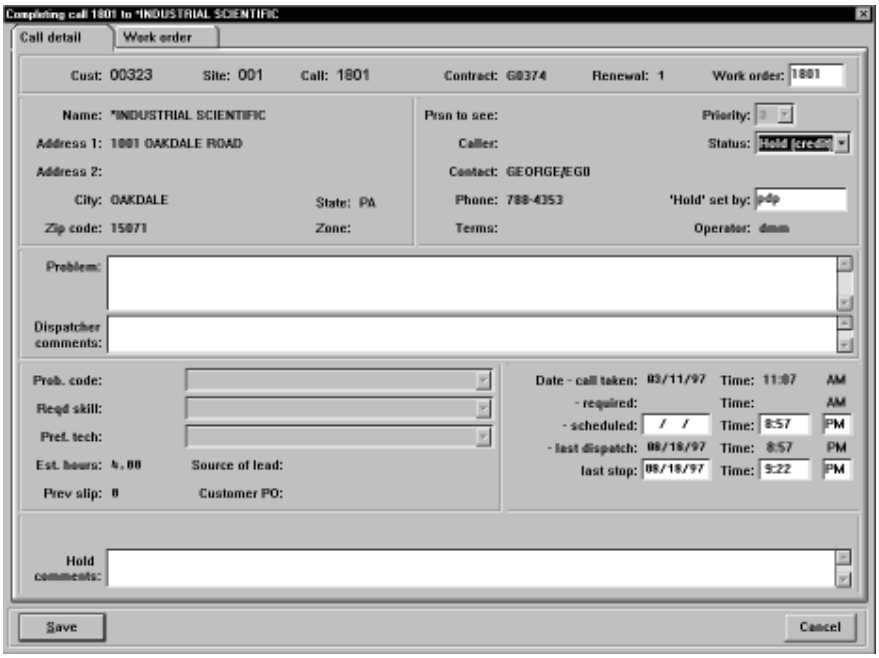
Once the technician and the call have both been selected, you can hold the call.

If the call has already been dispatched, use the **Complete** Action Button to Complete the selected call (displaying in the *Call View*).

You can also use the menu command **Dispatcher Actions** è **Complete**, press the [Alt] key combination, or use the pop-up menu. The *Call Detail* window for this call displays.

If the call has not been dispatched, use the **Update** Action Button to Complete the selected call (displaying in the *Call View).*

You can also use the menu command **Call ➔ Update Call**, press the [Alt] key combination, or use the pop-up menu. The *Call Detail* window for this call displays.



Change the call's status to **Hold (credit)**.

Enter comments about this hold in the **Hold Comments** field. You can also enter or update information in the following areas:

Work Order
Problem (text)
Dispatcher Comments (text)
Scheduled (date and time)
Last Stop (date and time)

You may also view the work order history for this site by selecting the *Work Order* page tab at the top of the window.

Once you have made any changes or corrections, click on the **Save** Action Button in the lower left of the *Call Detail* window to hold the call and return to the *Dispatch Board*.

☐*Create work order*

If you have set-up your COINS Service Management module (in Tailoring) to "Default Work Order from Call Slip #" and the work order does not already exist, you will be prompted to create the work order when the call entry screen has been completed.

- If you respond **Yes** to the dialog box, you will be prompted to enter the appropriate Work Order Fiscal Date.
- If you respond **No**, you will be returned to the *Dispatch Board*.

Hold for Parts

This long term hold is only used for calls awaiting parts. All other long term holds should use **Wait (other)** (see below).

☑*Select a call*

Use the *Display Controls* to sort and limit the calls displayed in the *Call Browser*. Select the call you wish to hold by highlighting it in the *Call Browser*. Detailed information about this call will appear in the *Call View*.

☑*Select a technician*

Once you have selected the call to hold, use the *Display Controls* to determine the technician(s) currently dispatched to the call. Select the appropriate technician by highlighting him/her in the *Technician Browser*.

☑*Hold the call*

Once the technician and the call have both been selected, you can hold the call.

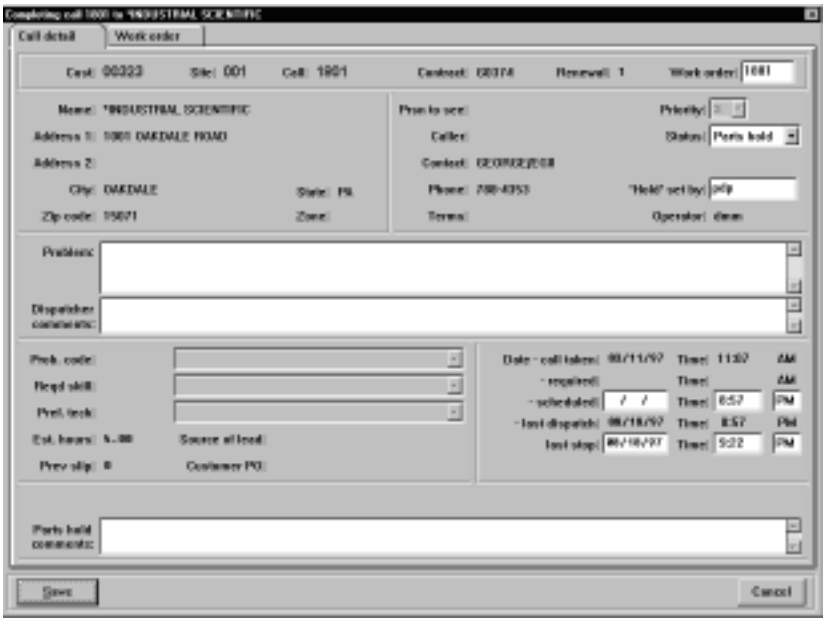
If the call has already been dispatched, use the **Complete** Action Button to hold the selected call (displaying in the *Call View*).

You can also hold this call by using the menu command **Dispatcher Actions ➔ Complete**, pressing the [Alt] key combination, or using the pop-up menu.

If the call has not been dispatched, use the **Update** Action Button to Complete the selected call (displaying in the *Call View*).

You can also use the menu command **Call ➔ Update Call**, press the [Alt] key combination, or use the pop-up menu.

The *Call Detail* window for this call displays.



Change the call's status to **Parts hold**. You can enter comments about this hold in the **Parts hold comments** field. You can also enter or update information in the following areas:

Work Order
Problem (text)
Dispatcher Comments (text)
Scheduled (date and time)
Last Stop (date and time)

You may also view the work order history for this site by selecting the *Work Order* page tab at the top of the window.

Once you have made any changes or corrections, click on the **Save** Action Button in the lower left of the *Call Detail* window to hold the call and return to the *Dispatch Board*.

☐*Create work order*

If you have set-up your COINS Service Management module (in Tailoring) to "Default Work Order from Call Slip #" and the work order does not already exist, you will be prompted to create the work order when the call entry screen has been completed.

- If you respond **Yes**, you will be prompted to enter the appropriate Work Order Fiscal Date.
- If you respond **No**, you will be returned to the *Dispatch Board*.

Wait (other)

Use the Wait (other) status to put a call on long term wait for other reasons as specified.

☑*Select a call*

Use the Display Controls to sort and limit the calls displayed in the *Call Browser*. Select the call to wait by highlighting it in the *Call Browser*. Detailed information about this call appears in the *Call View*.

☑*Select a technician*

Once you have selected the call you need to wait, use the Display Controls to determine the technician(s) currently dispatched to the call. Select the appropriate technician by highlighting him/her in the *Technician Browser*.

☑*Wait the call*

Once the technician and the call have both been selected, you can put a wait on the call.

If the call has already been dispatched, use the **Complete** Action Button to Wait the selected call.

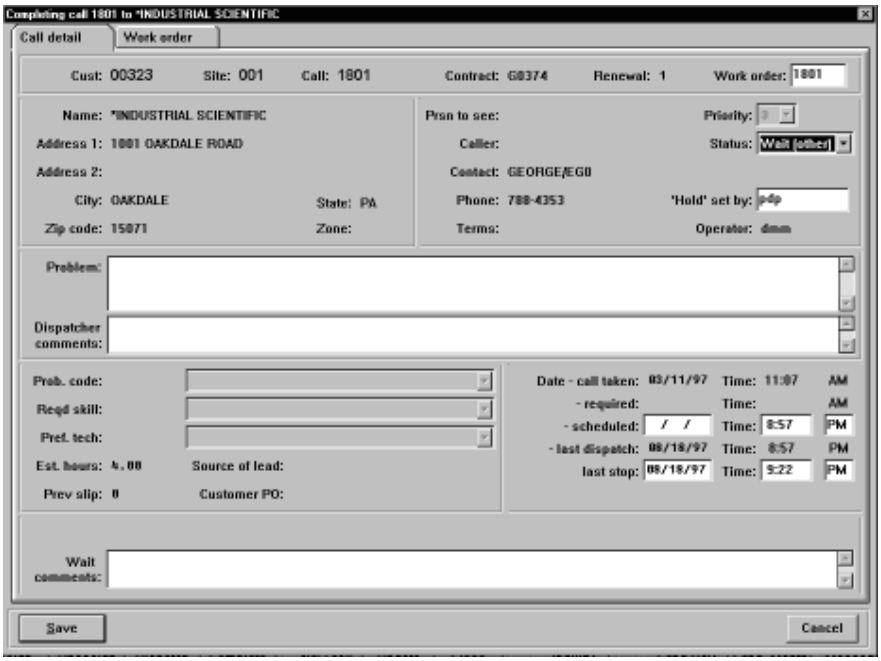
Dispatching Calls

You can also put a wait on this call by using the menu command **Dispatcher Actions ➔ Complete**, pressing the [Alt] key combination, or using the pop-up menu.

If the call has not been dispatched, use the **Update** Action Button to Complete the selected call (displaying in the *Call View*).

You can also use the menu command **Call ➔ Update Call**, press the [Alt] key combination, or use the pop-up menu. The *Call Detail* window for this call displays.

The Call Detail window for this call displays.



Change the call's status to **Wait (other)**. You can enter comments about this wait in the **Wait Comments** field.

You can also enter or update information in the following areas:

Work Order
Problem (text)
Dispatcher Comments (text)
Scheduled (date and time)
Last Stop (date and time)

You can review the work order history for this site by selecting the *Work Order* page tab at the top of the window.

Once you have made any changes or corrections, click on the **Save** Action Button in the lower left of the *Call Detail* window to wait the call and return to the *Dispatch Board*.

☐ *Create work order*

If you have set-up your COINS Service Management module (in Tailoring) to "Default Work Order from Call Slip #" and the work order does not already exist, you will be prompted to create the work order when the call entry screen has been completed.

- If you respond **Yes**, you will be prompted to enter the appropriate Work Order Fiscal Date.
- If you respond **No**, you will be returned to the *Dispatch Board*.

In Summary

In this chapter, we explored assigning, dispatching and holding calls. We learned the steps necessary to dispatch technicians to service calls and how to modify these dispatch assignments.

Technician Actions

What this chapter covers...

This chapter provides information about GUI Dispatch System options that are specific to technicians.

It will show you how to send your technicians messages, and to monitor their daily and monthly. This will help you to keep track of the technicians and to avoid scheduling conflicts.

Technicians Action Buttons

There are three main Technician Action Buttons. They are located on the lower right of the *Dispatch Board*.

These Technician Action Buttons allow you to perform actions for the selected technician (i.e., the one that is highlighted on the *Technician Browser*), the actions are independent of the selected Call.

Schd Day

Use this action button to display a daily schedule listing of Calls assigned to the selected technician.

Schd Month

This Technician Action button displays a monthly schedule of tasks that have been assigned to a selected technician, a long term schedule.

Messages

This action button brings up a window in which you can create and delete messages for a selected Technician.

Check Technician's Daily Schedule

All assigned calls become part of a technician's schedule. By checking the schedule when dispatching or assigning service calls, you can help prevent conflicts and provide more efficient call dispatching. You can also perform many dispatch functions from the schedule window using **Pop-up Menus**.

Step-by-step Instructions

☑*Select a technician*

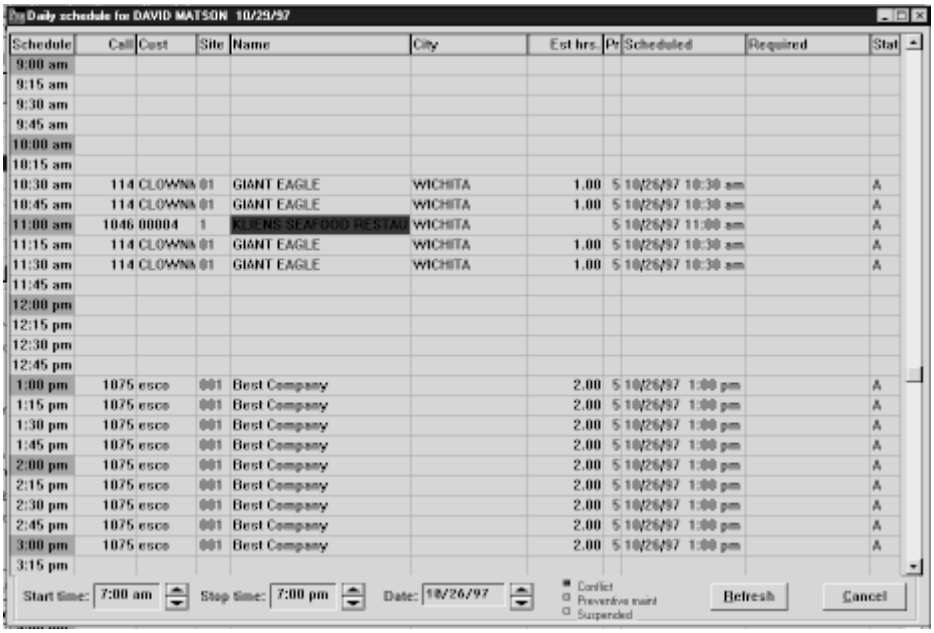
Use the Display Controls to determine the technician whose schedule you wish to review. Select the appropriate technician by highlighting him/her in the *Technician Browser*.

☑*View the schedule*

View the Schedule of the selected technician by clicking on the **Schd Day** Action Button or by using the menu command **Technicians ➔ Schedule**, by pressing the [Alt] key combination, or by using the pop-up menu.

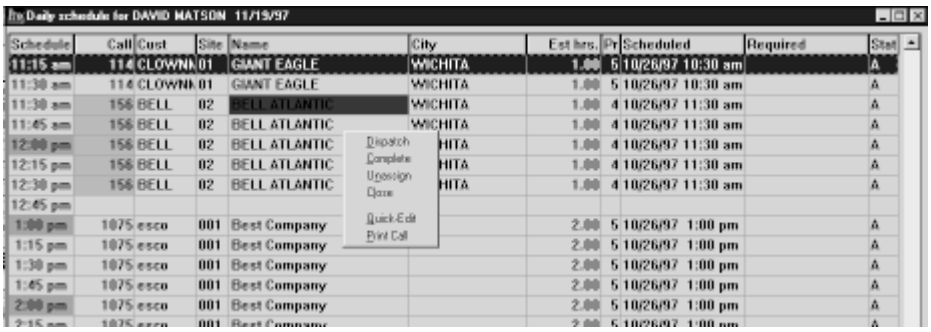
This brings up the *Daily Schedule* window for this technician.

You can modify this display by adjusting the times and/or date that you wish to review.


Daily schedule for DAVID MATSON 10/29/97
Schedule | Call | Cust | Site | Name | City | Est hrs. | Pr | Scheduled | Required | Stat
9:00 am
9:15 am
9:30 am
9:45 am
10:00 am
10:15 am
10:30 am 114 CLOWNA 01 GIANT EAGLE WICHITA 1.00 5 10/26/97 10:30 am A
10:45 am 114 CLOWNA 01 GIANT EAGLE WICHITA 1.00 5 10/26/97 10:30 am A
11:00 am 1046 00004 1 KLIENS SEAFOOD RESTAU WICHITA 5 10/26/97 11:00 am A
11:15 am 114 CLOWNA 01 GIANT EAGLE WICHITA 1.00 5 10/26/97 10:30 am A
11:30 am 114 CLOWNA 01 GIANT EAGLE WICHITA 1.00 5 10/26/97 10:30 am A
11:45 am
12:00 pm
12:15 pm
12:30 pm
12:45 pm
1:00 pm 1075 esco 001 Best Company 2.00 5 10/26/97 1:00 pm A
1:15 pm 1075 esco 001 Best Company 2.00 5 10/26/97 1:00 pm A
1:30 pm 1075 esco 001 Best Company 2.00 5 10/26/97 1:00 pm A
1:45 pm 1075 esco 001 Best Company 2.00 5 10/26/97 1:00 pm A
2:00 pm 1075 esco 001 Best Company 2.00 5 10/26/97 1:00 pm A
2:15 pm 1075 esco 001 Best Company 2.00 5 10/26/97 1:00 pm A
2:30 pm 1075 esco 001 Best Company 2.00 5 10/26/97 1:00 pm A
2:45 pm 1075 esco 001 Best Company 2.00 5 10/26/97 1:00 pm A
3:00 pm 1075 esco 001 Best Company 2.00 5 10/26/97 1:00 pm A
3:15 pm
Start time: 7:00 am
Stop time: 7:00 pm
Date: 10/26/97
Conflict
Preventive maint
Suspended
Refresh
Cancel

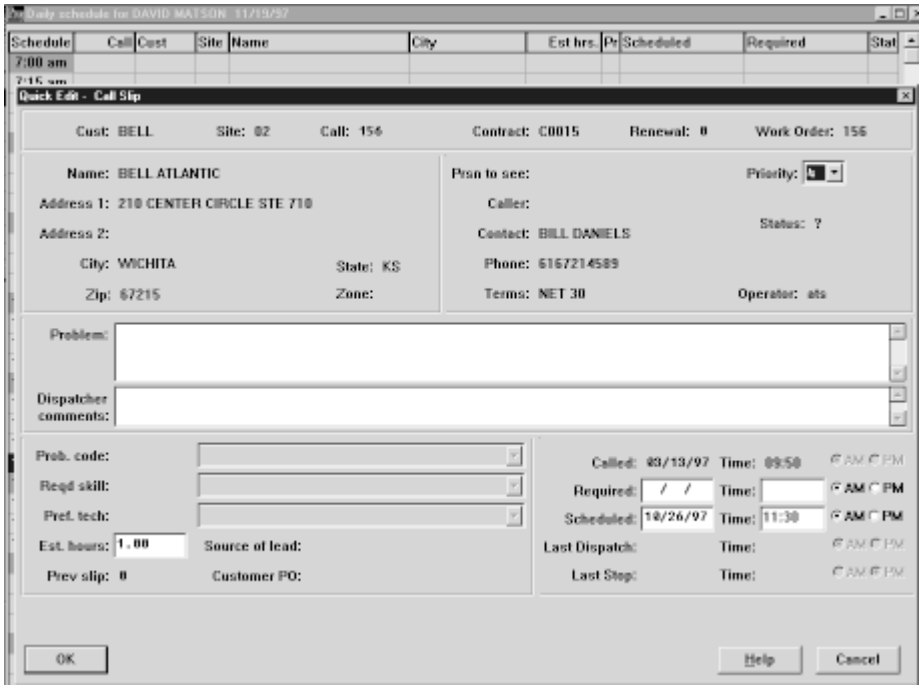
The display is color coded to illustrate whether a call is preventive maintenance (light green), suspended (light blue) or if the call is in conflict with another assigned call (dark blue).

It is possible to modify a call from the technician schedule screen. A single click on the right (or non-primary) mouse button will produce the following pop-up menu:


Daily schedule for DAVID MATSON 11/15/97
Schedule | Call | Cust | Site | Name | City | Est hrs. | Pr | Scheduled | Required | Stat
11:15 am 114 CLOWNA 01 GIANT EAGLE WICHITA 1.00 5 10/26/97 10:30 am A
11:30 am 114 CLOWNA 01 GIANT EAGLE WICHITA 1.00 5 10/26/97 10:30 am A
11:30 am 156 BELL 02 BELL ATLANTIC WICHITA 1.00 4 10/26/97 11:30 am A
11:45 am 156 BELL 02 BELL ATLANTIC WICHITA 1.00 4 10/26/97 11:30 am A
12:00 pm 156 BELL 02 BELL ATLANTIC HITA 1.00 4 10/26/97 11:30 am A
12:15 pm 156 BELL 02 BELL ATLANTIC HITA 1.00 4 10/26/97 11:30 am A
12:30 pm 156 BELL 02 BELL ATLANTIC HITA 1.00 4 10/26/97 11:30 am A
12:45 pm
1:00 pm 1075 esco 001 Best Company 2.00 5 10/26/97 1:00 pm A
1:15 pm 1075 esco 001 Best Company 2.00 5 10/26/97 1:00 pm A
1:30 pm 1075 esco 001 Best Company 2.00 5 10/26/97 1:00 pm A
1:45 pm 1075 esco 001 Best Company 2.00 5 10/26/97 1:00 pm A
2:00 pm 1075 esco 001 Best Company 2.00 5 10/26/97 1:00 pm A
Dispatch
Complete
Unassign
Close
Quick Edit
Print Call

Technician Actions

Highlight the desired function and you will be placed in the appropriate screen. For example, clicking on **Quick Edit** will produce the following screen, on which you can update call slip information.



Update or view the call slip information and click on the **OK** button and you will be returned to the daily planner display.

When you have finished with the daily planner display, simply click on **Cancel** to close the schedule window.

Check Technician's Monthly Schedule

The **Schd Month** technician action button displays a monthly schedule of tasks that have been assigned to a selected technician. This serves as a long term schedule for the technician.

Step-by-step Instructions

☑*Select a technician*

Use the Display Controls to determine the technician whose schedule you wish to review. Select the appropriate technician by highlighting him/her in the *Technician Browser*.

☑*View the task list*

View the monthly task list of the selected technician by clicking on the **Schd Month** Action Button or by using the menu command **Technicians ➔ Task**, by pressing the [Alt] key combination, or by using the pop-up menu.

This brings up the *Monthly Task List* window for this technician.

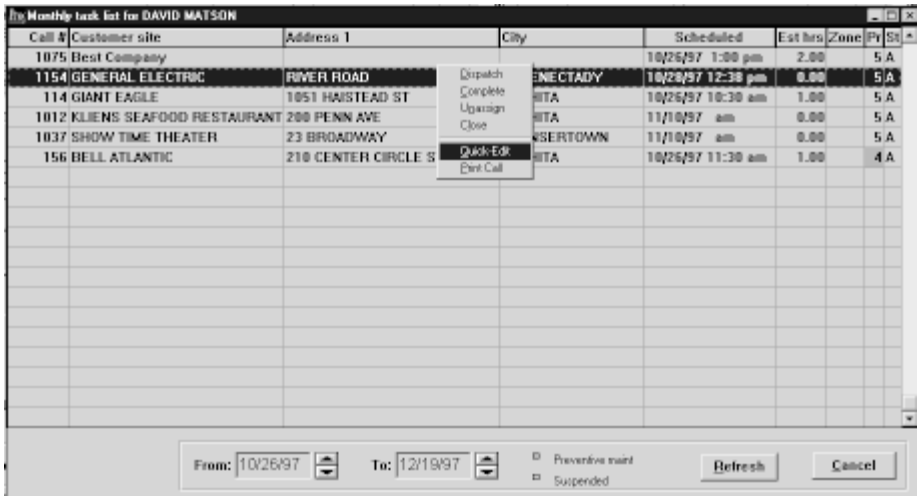
Monthly task list for CARSON, JEREMY
Call #
Customer site
Address 1
City
Scheduled
Est hrs
Zone
Pr
St
2256 TRI-STATE REALTY COMPANY 244 BLVD OF THE ALLIES PITTSBURGH 04/23/97 am 0.00 7 A
1518 *NEVILLE DEV./SVEDALA 4800 GRAND AVE. PITTSBURGH 06/20/97 am 0.00 5 A
3322 bama rags 10 Main St. Charlotesville 07/29/97 10:00 am 0.00 5 A
1686 LAKEWOOD PSYCHIATRIC HOSP 342 LINDEN CREEK ROAD CANONSBURG 03/01/97 am 0.00 3 A
1711 MARIAN MANOR 2695 WINCHESTER DRIVE PITTSBURGH 03/01/97 am 0.00 3 A
1717 CONTRAVES 610 EPSILON DRIVE PITTSBURGH 05/01/97 am 0.00 3 A
1620 WPXI - CHANNEL 11 P.O. BOX 1100 NORTH SIDE 03/01/97 am 0.00 3 A
1633 CARNEGIE NATURAL GAS COMP 800 REGIS AVENUE PLEASANT HILLS 03/01/97 am 0.00 3 A
1654 CENTRAL BLOOD BANK 812 FIFTH AVE. PITTSBURGH 03/01/97 am 0.00 3 A
1662 CLAYTON & CARRIAGE HOUSE 7227 REYNOLDS ST. PITTSBURGH 03/01/97 am 0.00 3 A
1666 312 BLVD. OF THE ALLIES BLDG 312 BOULEVARD OF THE ALLIES PITTSBURGH 03/01/97 am 0.00 3 A
1679 BASF CORPORATION 370 FRANKFURT ROAD MONACA 03/01/97 am 0.00 3 A
1707 REGENCY OF 5TH AVENUE 5025 FIFTH AVE. PITTSBURGH 03/01/97 am 0.00 3 A
1714 209 9TH STREET BUILDING 209 9TH STREET PITTSBURGH 03/01/97 am 0.00 3 A
1741 ST. AUGUSTINE PLAZA 230 THIRTY-SIXTH STREET PITTSBURGH 03/23/97 am 0.00 3 A
1811 ST. AUGUSTINE PLAZA 230 THIRTY-SIXTH STREET PITTSBURGH 03/01/97 am 0.00 3 A
1918 SARGENT ELEC/METER SHOP 2828 LIBERTY AVENUE PITTSBURGH 04/01/97 am 0.00 3 A
1989 SEARS PENN CENTER 3470 WILLIAM PENN HIGHWAY PITTSBURGH 04/01/97 am 0.00 3 A
1995 BASF CORPORATION 370 FRANKFURT ROAD MONACA 04/01/97 am 0.00 3 A
From: 03/01/97
To: 04/30/97
Preventive maint
Suspended
Cancel

Technician Actions

You can modify this display by adjusting the date range that you wish to review.

The list is color coded to illustrate whether a call is preventive maintenance (light green) or suspended (light blue).

It is possible to modify a call from the monthly schedule screen. A single click on the right (or non-primary) mouse button will produce the following pop-up menu:



Highlight the desired function and you will be placed in the appropriate screen. For example, clicking on **Quick Edit** will produce a screen on which you can update call slip information.

> Update or view the call slip information and click on the **OK** button and you will be returned to the daily planner display.

When you have finished with the monthly task list display, simply click on **Cancel** to close the schedule window.

Enter/Receive a Technician Message

GUI Dispatch contains a message system that allows you to enter messages to your technicians.

Whenever a technician has a message, a note to that effect appears in the Technician view of the Dispatch Board.

Step-by-step Instructions

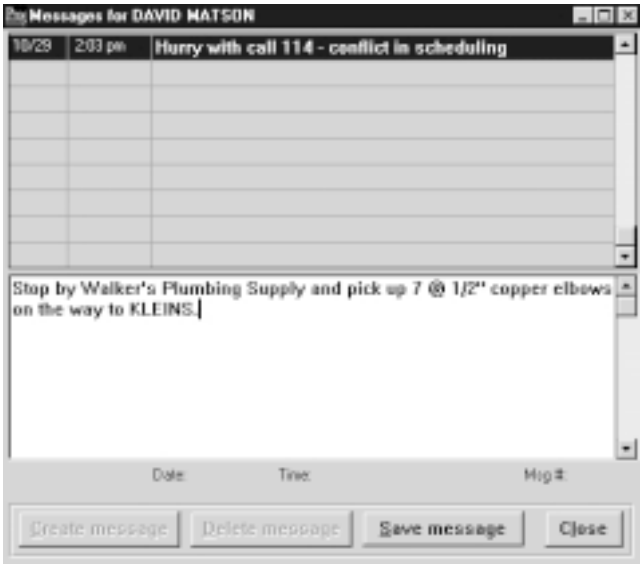
☑*Select a technician*

Use the *Display Controls* to determine the technician you wish to send a message. Select the appropriate technician by highlighting him/her in the *Technician Browser*.

☑*Create a message*

Use the **Message** Action Button to enter technician messages. You enter the message utility by clicking on the **Message** Action Button or by using the menu command **Technicians ➔ Message**, by pressing the [Alt] key combination, or by using the pop-up menu.

This brings up the Message window for this technician.



Technician Actions

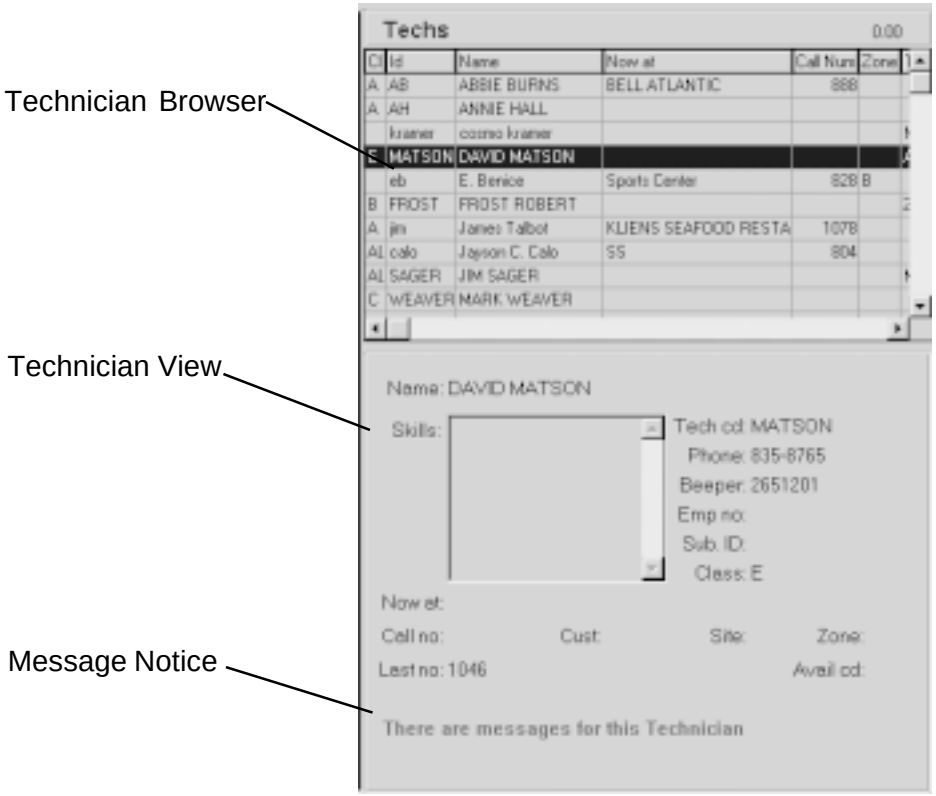
Click on **Create message** (or press the [Alt] key combination) to send a message to this technician. You will be prompted by a blinking cursor in the text box. Simply type your message. You can enter an unlimited number of lines. The system will supply the current date and time along with the dispatcher's initials to the message.

☑*Save the message*

When you have finished entering the message, click **Save message** (or press **[Return]** or **[Alt][S]** on you keyboard) to send your message.

When you have finished with the message utility, simply click on **Close** to close this window.

Whenever a technician has a message waiting, a note to that effect appears in the Technician View for that technician.



Delete a Technician Message

It is possible to delete a technician message.

Step-by-step Instructions

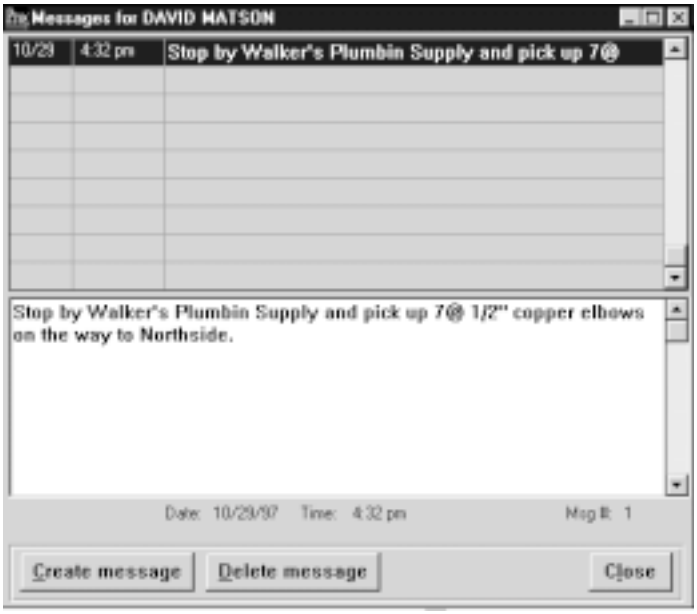
☑*Select a technician*

Use the *Display Controls* to determine the technician whose message you wish to delete. Select the appropriate technician by highlighting him/her in the *Technician Browser*.

☑*Delete a message*

Use the **Message** Action Button to enter technician messages. You enter the message utility by clicking on the **Message** Action Button or by using the menu command **Technicians ➔ message**, by pressing the [Alt] key combination, or by using the pop-up menu.

This brings up the Message window for this technician.


Messages for DAVID MATSON
10/29
4:32 pm
Stop by Walker's Plumbin Supply and pick up 7@
Stop by Walker's Plumbin Supply and pick up 7@ 1/2" copper elbows on the way to Northside.
Date: 10/29/97
Time: 4:32 pm
Msg #: 1
Create message
Delete message
Close

Technician Actions

Select the message you wish to delete by highlighting it. Click on **Delete message** (or press the [Alt] key combination) to delete the message. The message no longer appears in the message window.

Note: There is no confirmation option for the deleting of messages. Make very sure that you want to perform the deletion.

When you have finished with the message utility, simply click on **Close** to close this window.

In Summary

In this chapter, we explored the Technician Action Buttons. We learned how to check the technician's schedule (daily and monthly) and how to send and maintain technician messages.

Reports and Inquiries

What this chapter covers...

This chapter describes the reports and inquiries available in the GUI Dispatch System.

It will instruct you in the steps necessary to obtain an individual report and the benefits of the available reports and inquiries.

Site Inquiry

The Service Site Inquiry is a quick way to view information about a service site. You can request to see this inquiry by clicking on the **Inquiry** action button located along the bottom of the *Dispatch Board*.

You may also use the drop-down menu **Dispatcher Actions** ➔ **Site Inquiry** or press **[Alt][Q]** on your keyboard. This action produces a *Site Inquiry Notebook* window.

The *Site Inquiry Notebook* consists of the following pages:

Site Selection Page

Allows direct choice of a customer site for inquiry, based upon you entry of a site's name, address, city or phone.

Customer Site Page

Helps select a site for inquiry by selecting a customer. Displays valuable customer information.

Equipment Page

Review the equipment associated with a site.

A/R History Page

Review the A/R history of the customer site.

Contracts Page

Review the Contracts associated with a site. It is only accessible when the currently selected site has contracts.

Work Orders Page

Review the work orders associated with the selected site.

Note: This information is the same as that displayed on the *Call Detail Notebook* except that it contains no *Call Detail* page.

You can select a page from the notebook by clicking on the appropriate tab folder along the top of the window. You may also select a page by using the navigational action buttons located at the bottom of the *Call Detail Notebook* or by pressing the appropriate keys, for example, **[Alt][C]** for the *Customer Site* page.

Site Selection Page

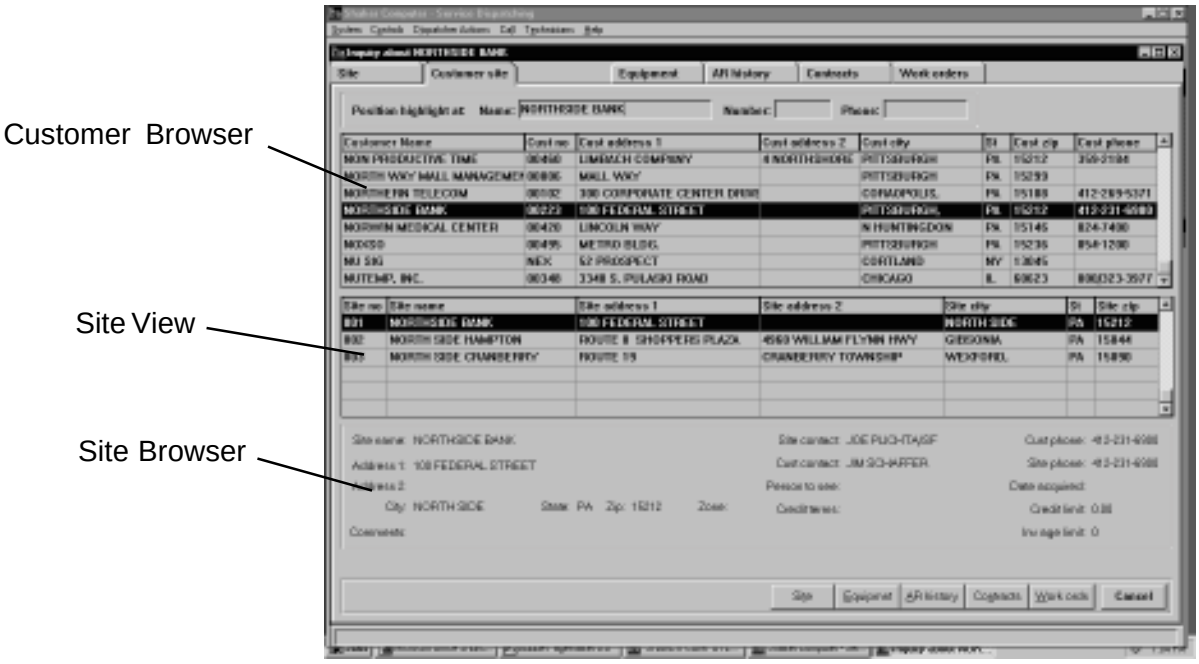
This is the first page you see when you open the *Site Inquiry Notebook*.

Use the *Site* page to locate the site you wish to inquiry. You can find the customer site by entering the name, address, city or phone number. As you enter data, the system tries to match that information with a customer site on file. When it finds a match, it highlights the site in the *Site Browser* and displays the site information in the *Site View*.

Selecting a site on the *Site* page causes the system to retrieve the corresponding customer and to adjust the *Site Inquiry Notebook* pages to reflect the selection.

Customer Site Page

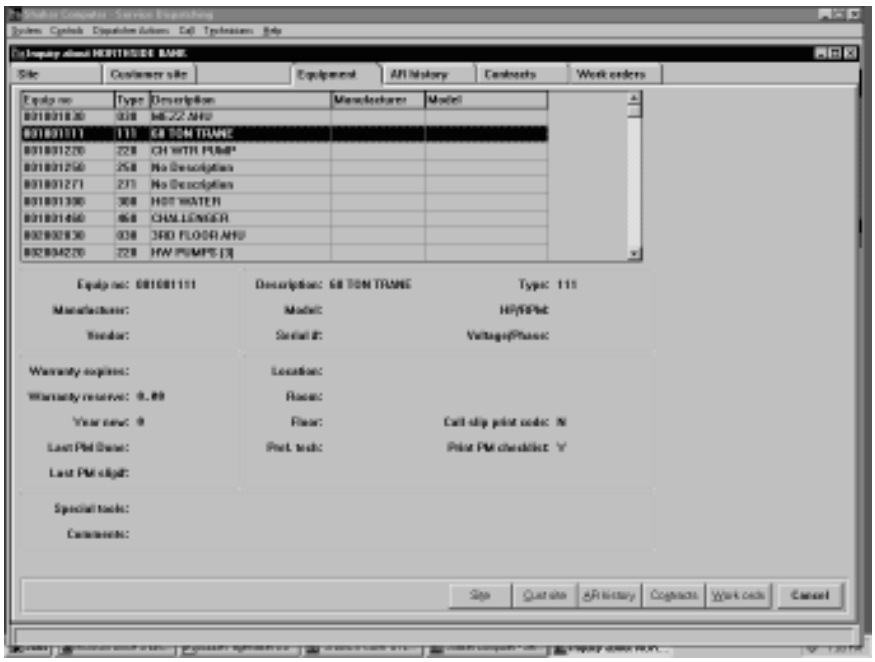
If you cannot locate the site you are looking for, you can try to locate the customer through the *Customer Site* page.



The *Customer Site* page provides a way to lookup a customer using the customer name, customer number or phone number. When you enter the data, the system tries to match that information with a customer on file. When it finds a match, it highlights the customer in the *Customer Browser* and the site in the *Site Browser* and displays the site information in the *Site View*.

Equipment Page

The *Equipment* page lets you review the equipment associated with the selected customer site.

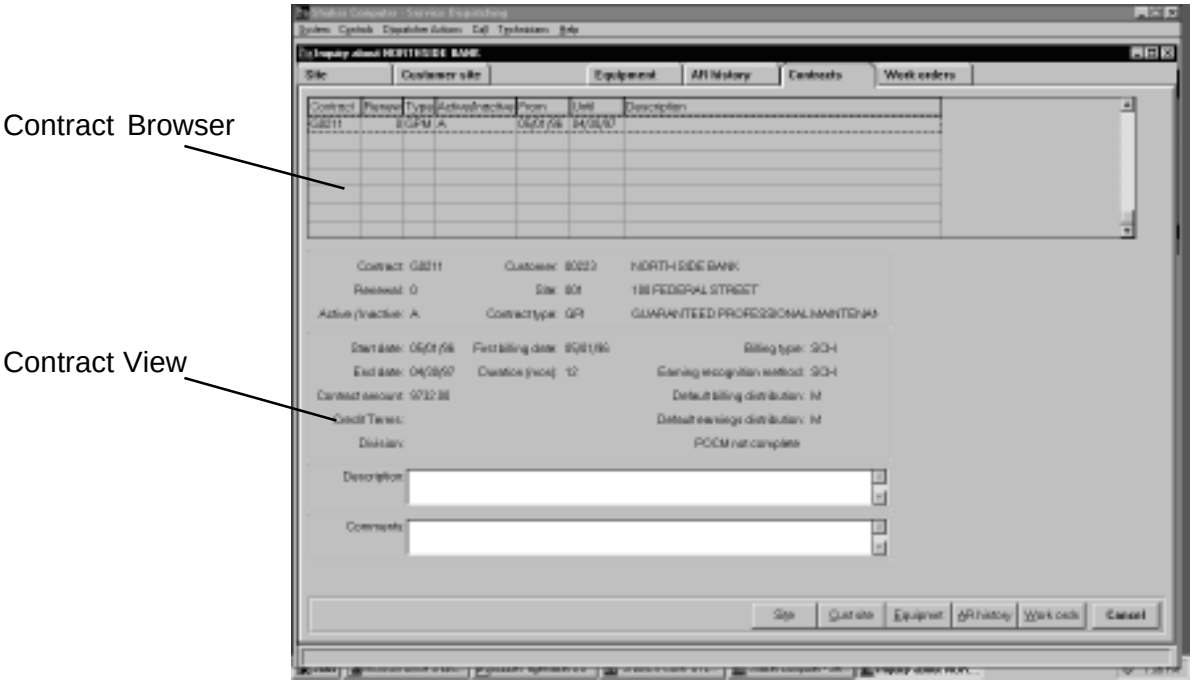


A/R History Page

The *A/R History* page allows you to review the A/R history of the call's customer

Contracts Page

The *Contracts Page* allows you to review the contracts for the selected customer site.



Use the *Contract Browser* to locate the appropriate contract by highlighting it. The *Contract View* will give you detailed information about the selected contact.

Work Orders Page

The Work order page allows you to view existing work orders for the chosen customer site.

Work Order Browser

Work Order View

Use the *Work Order Browser* to locate the appropriate contract by highlighting it. The *Work Order View* gives you detailed information about the selected work order.

In Summary

In this chapter, we explored the various reports and inquiries available in the GUI Dispatch system.